# MANITOBA TRAVEL MARKET SURVEY

## - FINAL REPORT -

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**Submitted To: Culture, Heritage and Tourism**

**Information Resources**

**July, 2000**

PROBE

RESEARCH INC.

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# TABLE OF CONTENTS

**EXECUTIVE SUMMARY** ..... 5

**1.0 BACKGROUND AND METHODOLOGY** ..... 7

**2.0 TRAVELER PROFILE** ..... 9

2.1 DESTINATION AND DESTINATION RATIONALE ..... 9

Travel Destination ..... 9

Destination Rationale ..... 10

2.2 GROUP COMPOSITION ..... 11

Number of Travelers in Party ..... 11

Incidence of Children in Party ..... 12

Travel Season ..... 13

Transportation Mode ..... 13

Accommodation Type ..... 15

Vacation Activities ..... 16

**3.0 URBAN AND OUTDOOR TRAVEL SEGMENTS** ..... 18

**4.0 AWARENESS OF MANITOBA VACATION OPPORTUNITIES** ..... 22

4.1 FAMILIARITY WITH MANITOBA VACATION OPPORTUNITIES ..... 22

4.2 SOURCES OF MANITOBA TRAVEL AND VACATION INFORMATION ..... 24

**5.0 CANADA AND MANITOBA VISITATION INCIDENCE** ..... 25

5.1 INCIDENCE OF CANADIAN VACATION VISITS ..... 25

Canadian Destinations ..... 26

5.2 INCIDENCE OF MANITOBA VISITATION AND TRIP PURPOSE ..... 27

5.3 TIMING, FREQUENCY AND DURATION OF MANITOBA VISITS ..... 30

Timing ..... 30

Frequency ..... 31

Duration of Visits ..... 32

Breakdown of Duration ..... 33

Trip Satisfaction ..... 34
Intended Re-Visits ..... 36

**6.0 MANITOBA TRAVEL MARKET POTENTIAL ..... 38**

**7.0 PROFILE OF INTERESTED AND RETURN VISITORS ..... 40**

7.1 Profile of Likely Visitors ..... 40
7.2 Profile of Return Visitors in Key Markets ..... 42

**8.0 KEY DIMENSIONS OF MANITOBA TOURISM ..... 44**

8.1 Perceived Importance of Selected Tourism Amenities ..... 44
8.2 Possession of Selected Tourism Amenities ..... 45

**9.0 QUADRANT ANALYSIS ..... 47**

9.1 Explanation of Quadrant Analysis ..... 47
9.2 International Comparison of Bivariate Quadrant Analysis ..... 49
9.3 Analysis of United States Markets ..... 51
North Dakota ..... 51
Minneapolis / St. Paul ..... 52
Minnesota ..... 53
Denver ..... 54
Chicago ..... 55
9.4 Analysis of Canadian Markets ..... 56
Saskatoon ..... 56
Regina ..... 57
Greater Toronto ..... 58
Thunder Bay ..... 59
Sault Ste Marie ..... 60

**10.0 IMPACT OF CURRENCY DIFFERENTIAL ON TRAVEL BEHAVIOUR ..... 61**

10.1 Awareness of Dollar Differential ..... 61
10.2 Impact of Dollar Differential ..... 64

**11.0 MEDIA UTILIZATION** ..... 65

11.1 MEDIA CONSUMPTION ..... 65

Radio ..... 66

Television ..... 66

Internet ..... 67

Newspapers ..... 69

Magazines ..... 70

11.2 TRAVEL PLANNING INFORMATION RESOURCES ..... 70

**APPENDICES:**

ANNOTATED SURVEY INSTRUMENT

DETAILED TABULAR RESULTS

## Executive Summary

A thorough examination of the views of former visitors to Manitoba reveals that nine in ten tourists are satisfied with their experience in this province and that a comparable number indicate they will make a return visit to Manitoba. This positive finding exists within a larger context whereby in Manitoba, as elsewhere, opportunities in tourism and pleasure travel markets are greatly influenced by access and proximity. Briefly, exposure to Manitoba and its tourist offerings diminishes with geographic reach. As a location that is relatively geographically isolated from major North American population centres, attracting large numbers of tourists to this province presents a considerable challenge.

Exploring Manitoba's tourist potential also reveals that more than one-half of those who have *not* visited Manitoba to date remain open to the idea of such a trip, even if only around one in ten of these potential new visitors express a deeper interest in actually coming.

Harnessing Manitoba's travel potential and attracting new and greater numbers of tourists requires an appreciation of the province's critical travel assets and the extent to which these factors motivate travel behaviour. The opportunity analysis provided in this study shows that, while Manitoba can boast of a series of key tourist benefits, these same qualities suffer from a lack of distinction and are commonly found in many locations with tourism aspirations ('safety', 'cleanliness', 'family orientation' etc.).

While there appears to be an overall pattern where Manitoba lacks conspicuous and unexploited tourism opportunities, closer analysis of specific markets reveals instances where information deficits may be addressed. For example, in markets such as Greater Toronto, Denver and Chicago the presence of quality resorts, a wide range of accommodations and good highways and roads are specific features of the Manitoba vacation experience that are largely unrecognized and could be promoted. This province is acknowledged as possessing some tourist amenities such as lakes, quality hunting and fishing and relative isolation; however, these attractions resonate only with smaller market sub-groups or tourism niches.

Some of Manitoba's most visible and celebrated tourist features (festivals, beaches, golf opportunities) remain undervalued by large numbers of potential visitors. Compounding this circumstance is the fact that many of these features are not currently highly valued by large numbers of potential tourists.

This comprehensive study surveys ten distinct markets of interest to Manitoba's tourism industry. In each of the five markets in Canada and the USA, specific attitudinal and behavioral patterns with respect to Manitoba's travel and tourism market have been observed. The positive experiences of past visitors, coupled with varying levels of awareness, appreciation and experience with Manitoba travel and tourism features among non-visitors, provides a sound basis for the development of promotional efforts that best address the needs of specific segments of the tourism market.

Like the tip of an iceberg, a wealth of specific data lurks just below the surface allowing for an almost boundless level of micro-analysis. It is this information that will serve those whose formidable task it is to develop, market and promote Manitoba and its tourism possibilities.

*For more information on this survey please contact Probe Research Inc. at:*
*(204) 955-9777*

# 1.0 BACKGROUND AND METHODOLOGY

Probe Research Inc. was commissioned by the Manitoba Government's Department of Culture, Heritage and Tourism to undertake qualitative and quantitative research in Manitoba's major external pleasure travel markets. The findings contained in this report pertain to a comprehensive quantitative survey of 2200 adults within ten distinct U.S. and Canadian travel markets.

Specific areas of enquiry examined in this research include:

*Travelers and Visitor Profiles* – An examination of the attitudinal, behavioural and Socio-demographic characteristics of Manitoba visitors, non-visitors and potential visitors.

*Awareness Dimensions* – A review of public familiarity with Manitoba vacation opportunities and the source of this information. Awareness items also include perceptions of the availability of a range of selected tourism amenities and dollar exchange rate differences.

*Visitor Segmentation* – A bivariate analysis comparing the behaviours and attitudes of three distinct tourist types. "Urban Adventurers", Outdoor Adventurers" and "Eclectic Travelers" are each examined across a range of survey variables.

*Travel Market Potential* – Respondents who had not visited Manitoba are sequestered into separate groups based upon their self-reported likelihood of a future visit. "Keen", "Warm" and "Averse" respondents are examined throughout this study.

*Tourism Features and Amenities* – Potential visitors assess the importance of a range of tourism features and amenities.

*Asset and Opportunities Analysis* – An exploration of the relationship between respondent's valuation of selected travel amenities and the perceived availability of these features in Manitoba.

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*Media Utilization* – An inventory of respondent use of selected media and information vehicles.

Telephone interviews were conducted from a central data collection facility located in Winnipeg Manitoba between May 23 and June 21, 2000.

Random digit dialing was employed to ensure adult respondents in all markets would have an equal opportunity to participate in this research. In total, 2,200 telephone interviews were completed. The sample disposition across markets and the associated margins of error are presented in the table below:

| *Market* | *Completed Interviews* | *Margin of Error* |
|---|---|---|
| ***Total (All Markets)*** | **2,200** | **±2.09** |
| ***Canada Total*** | **1,000** | **±3.10** |
| ***Greater Toronto*** | 200 | ±6.93 |
| ***Sault Ste Marie*** | 200 | ±6.93 |
| ***Thunder Bay*** | 200 | ±6.93 |
| ***Regina*** | 200 | ±6.93 |
| ***Saskatoon*** | 200 | ±6.93 |
| ***U.S.A. Total*** | **1,200** | **±2.83** |
| ***North Dakota*** | 400 | ±4.90 |
| ***Minneapolis/St. Paul*** | 200 | ±6.93 |
| ***Minnesota (Rural)*** | 200 | ±6.93 |
| ***Denver*** | 200 | ±6.93 |
| ***Chicago*** | 200 | ±6.93 |

Statistical weighting has been applied to this data to ensure gender representation in all markets most closely reflects the actual distribution of men and women within the larger population. Pre and Post examination of the impact of weighting of total results reveals only minor statistical impact upon overall results. In most cases, the variance in total results between the pre and post weighted data is less than a single percentage point. The effect of this weighting may be more pronounced within survey sub-groups including geographical regions.

Data analysis was performed using a combination of packaged and custom software.

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# 2.0 TRAVELER PROFILE

Respondents who had traveled outside of their home state or province in the past 36 months were presented with a line of enquiry that provided a profile of destinations and the reasons for specific destination choices; travel group composition; seasonal travel preferences; mode of transportation and accommodation, and the most frequently enjoyed vacation activities.

## *2.1 Destination and Destination Rationale*

**TRAVEL DESTINATION**

When asked to report the location of their last out of province or state trip, a clear pattern emerges that reveals a deep seated behavioral difference between Canadian and American travelers. As the table below indicates, Canadians were most likely to have remained within Canada during their last visit (49%), although a great many had visited U.S. destinations when they last ventured outside of their home province.[1] In great contrast, the overwhelming majority of U.S. travelers remained in the U.S. when they last left their home states (89%).

**LOCATION OF LAST OUT OF PROVINCE/STATE VISIT**

| | Total | Canadian Travelers | U.S. Travelers |
|---|---|---|---|
| *(Base)* | (1800) | (781) | (1019) |
| | (%) | (%) | (%) |
| *Canadian Destinations* | 24 | 49 | 5 |
| *U.S. Destinations* | 64 | 32 | 89 |
| *Other Destinations* | 12 | 19 | 6 |

*"Where did you go on your last trip outside of the State/Province?"*

[1] Here it is important to consider the possible seasonal effect that may have been at play during this spring data collection period. Respondents may have been more likely to have visited warm weather destinations including many U.S. travel sites than would have been the case were this poll to have been conducted in the late summer or fall.

Looking at these results by markets reveals the importance of geographic proximity as an influence upon the most recent travel destination. For example, residents of North Dakota were far more likely to have visited neighboring Minnesota (17%) than other destinations, and Alberta locations were favoured by Saskatchewan travelers (17% Edmonton, 13% Banff, 12% Alberta). As well, Manitoba's Saskatchewan neighbours (6% Saskatoon, 4% Regina) and those from Thunder Bay (4%) reported the Keystone Province as their most recent travel destination.

**DESTINATION RATIONALE** When respondents were called upon to provide reasons for choosing the location of their last out of province or state visit, a variety of reasons were offered. Chief among these travel motives was "visiting friends or family" – mentioned by nearly six in ten respondents (58%), rising to 61 percent among American respondents.

The table below documents some of the principal factors influencing choice of travel locations:

**RATIONALE FOR RECENT TRIP**
**- Total Mentions -**

| | Total | Canada | U.S.A. |
|---|---|---|---|
| ***Base*** | (1800) | (781) | (1019) |
| | (%) | (%) | (%) |
| ***Visit Family/Friends*** | 58% | 55% | 61% |
| ***Cultural Activities*** | 14% | 16% | 8% |
| ***Rest/Relaxation*** | 9% | 11% | 8% |
| ***Outdoor Activities*** | 9% | 8% | 9% |
| ***Climate*** | 6% | 7% | 6% |
| ***Business*** | 6% | 6% | 6% |

## 2.2 Group Composition

**NUMBER OF TRAVELERS IN PARTY**

Travelers are most likely to have made their last journey in the company of one other person (38%). Just over one in four (28%) travel with a party of three to four people, while only 16 percent travel with a group of five or more people. Traveling alone outside of a home state or province was also comparatively less common (12%).

### Group Composition

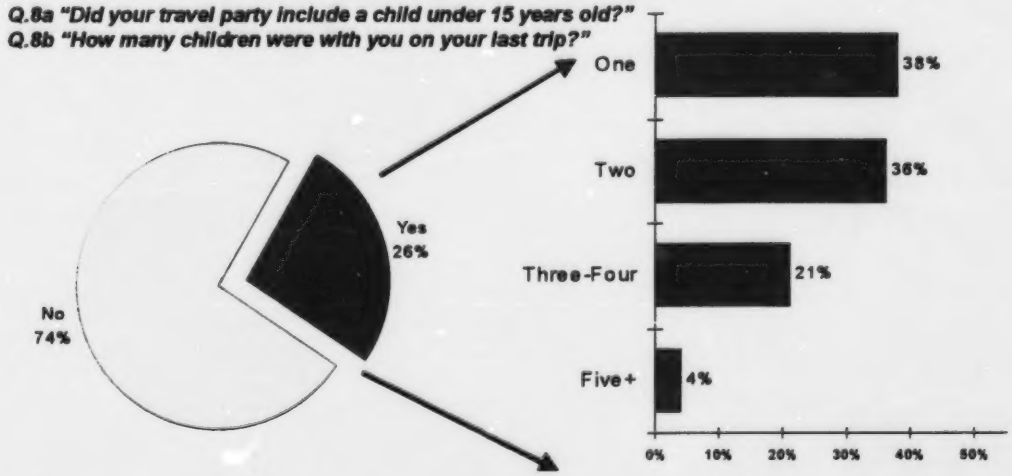
*Q.7 "How many people were in your travel party when you last took a trip outside your (state/province)?"*

Interestingly, respondents from urban centres were somewhat more likely to have traveled unaccompanied on their last trip: Denver (25%), Minneapolis/St. Paul (21%), Greater Toronto (20%), Saskatoon (20%) and Chicago (19%). This may be partially due to a higher level of business travel emanating from major urban centres.

**INCIDENCE OF CHILDREN IN PARTY**

Overall, one in four (26%) travelers were accompanied by a child under 15 years of age on their last trip out of their home province or state. The incidence of children on this trip was fairly consistent across markets, rising slightly among respondents from Denver (31%), Minneapolis/St. Paul (30%) and Chicago (29%).

## Presence of Children on Trip



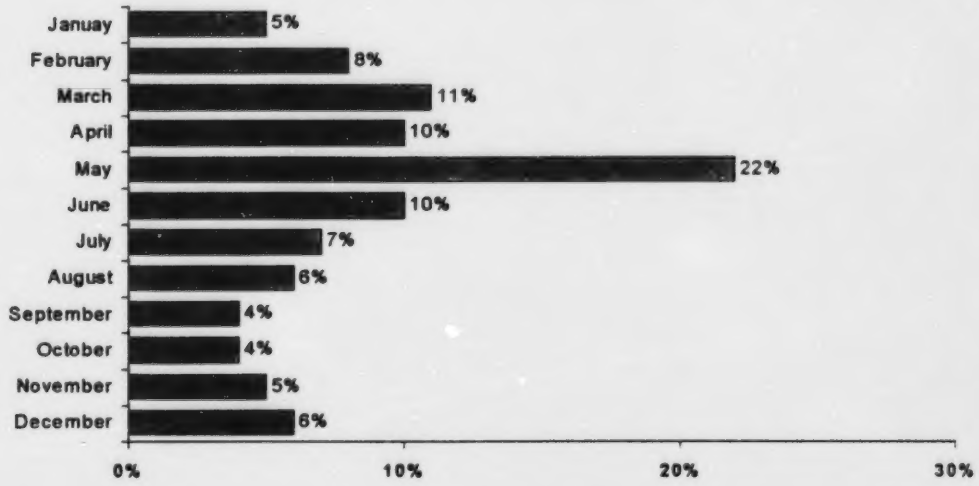

Female travelers (31%) were more likely than their male counterparts (20%) to be accompanied by a child or children, as were Outdoor Adventurers (30% versus 22% among Urban Adventurers).

Those travelers who were accompanied by children were most likely to have one (38%) or two (36%) children in their travel party. Only one in five (21%) had three to four children, while a small percentage (4%) of travelers had four or more children in their travel party.

**TRAVEL SEASON** Survey participants who had traveled outside of their home province or state in the past three years, were likely to report traveling in one of the months during or immediately preceding the June data collection period. Overall, May (22%) was the most frequently mentioned month of last travel, followed by March (11%), June (10%), April (10%) and February (8%).

## Month of Most Recent Trip

*Q.9 "In what month did you take this trip?"*




**TRANSPORTATION MODE** More than one-half (54%) of those visiting outside of their home province or state on their last trip, reported they traveled by car to these destinations. Because of the timing of the survey, overall, 40 percent of respondents who had recently traveled out of their province/state reported using the plane as their mode of transportation. This is no doubt the result of many of these respondents having traveled

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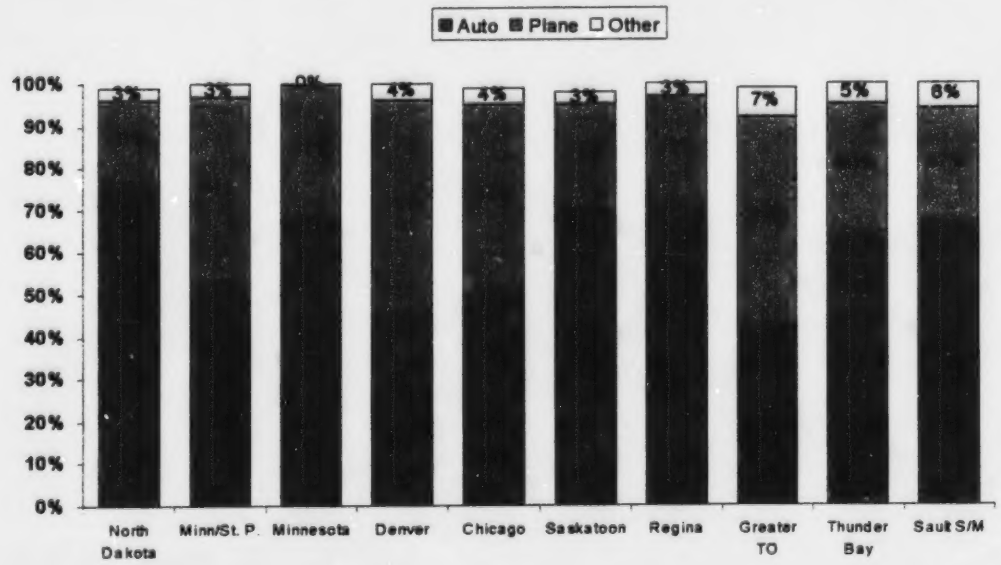
to warmer climes during the previous winter months. Bus (3%), motor home (2%) and train (1%) were far less common travel modes.

## Typical Transportation Mode

*Q.11 "And what form of transportation do you use most often for trips outside the state/province?"*




By comparison, when travelers were asked what form of transportation they use most often for trips outside of their home province or state, the use of cars climbs by nine percentage points to 63 percent.

The incidence of automobile as the "most frequently" used form of transportation is highest in North Dakota (77%), Regina (72%) Saskatoon (70%) and Minnesota (69%). Respondents from Denver (50%) and Toronto (49%) were more likely to travel by plane than by car on their out-of-region trips.

Men (65%) were somewhat more likely than women (60%) to travel by car, as were younger respondents (68% 18-34 years versus 58% over 55 years of age). The automobile was the most

frequently used form of transportation for all but the most affluent of travelers. The high income travelers were most likely to travel most often by Airplane (57% versus 47% who travel by car in the over $80,000 income group).

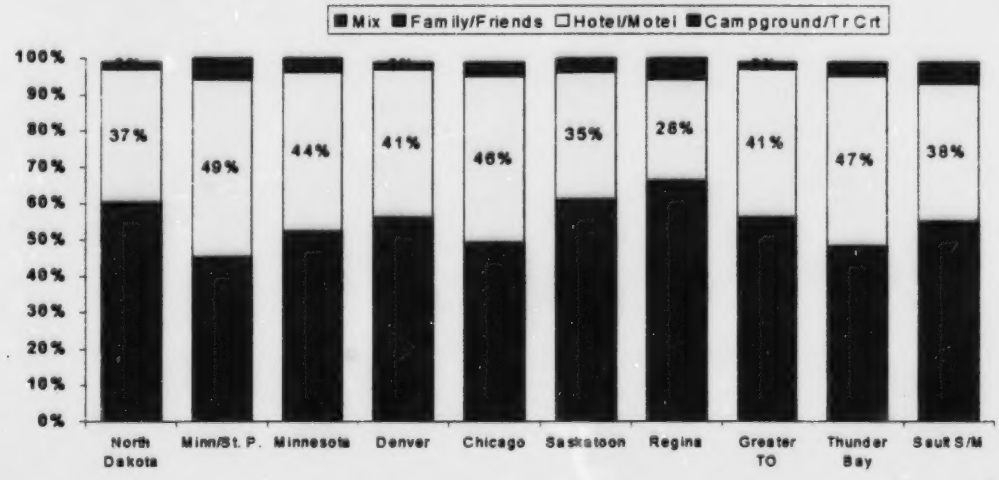
Non-visitors who plan to visit Manitoba some day or "keen" visitors (66%), and those who may visit this province (64%) "warm" visitors were significantly more likely to rely on automobile travel than were those who were averse to coming to Manitoba (49%).

**ACCOMMODATION TYPE**

Four in ten travelers report typically staying at either a hotel (26%) or a motel (14%) when they travel outside of their home province or state. Nearly one in three (31%) indicate that they stay at a variety of accommodations, while 24 percent stay with family and friends. A much smaller proportion of travelers rely on campgrounds (3%) or trailer parks (1%) for their vacation accommodations.

## Accommodation Preference

*Q. 12 "When you travel outside of (state/province), where do you stay most often?"*



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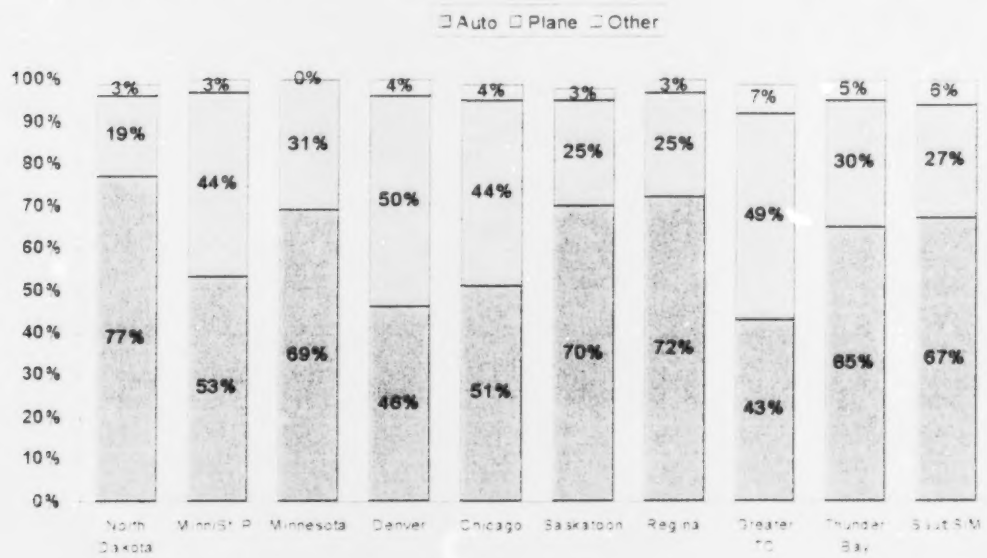


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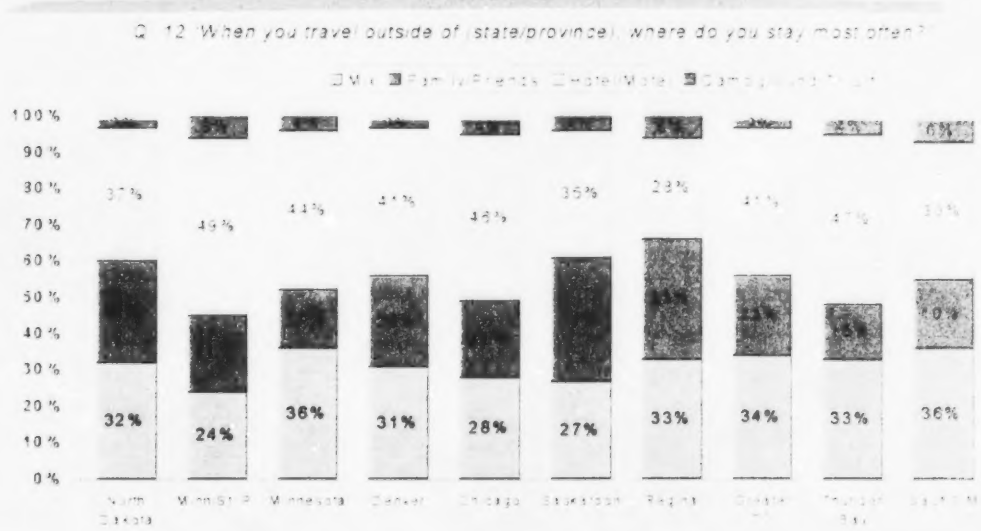


**VACATION ACTIVITIES**

There was a high degree of consistency across regions concerning the types of activities travelers typically enjoy on their vacation. "Dining out" (95%) was reported to be the most frequently enjoyed of vacation activities regardless of where travelers originate. "Going shopping" (79%) is the second most frequently enjoyed activity in most regions studied, placing slightly behind "going to the beach" in Minneapolis/St. Paul (78%) and Greater Toronto (87%). "Going to the beach" (71%) was generally the third most preferred activity, followed by "museums" (66%). The table below summarizes popular tourist activities across the ten markets examined in this research.

**TYPICAL VACATION ACTIVITIES**

| | | UNITED STATES | | | | | CANADA | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Total | ND | M S/P | Mn | Denver | Chicago | Saskatoon | Regina | Greater T/O | Thunder Bay | Sault SM |
| | (1800) (%) | (345) (%) | (173) (%) | (155) (%) | (165) (%) | (181) (%) | (179) (%) | (165) (%) | (157) (%) | (143) (%) | (136) (%) |
| ***Dining out*** | 95 | 95 | 92 | 89 | 99 | 97 | 94 | 94 | 97 | 95 | 97 |
| ***Shopping*** | 79 | 78 | 71 | 71 | 71 | 81 | 82 | 84 | 82 | 79 | 85 |
| ***Beach*** | 71 | 56 | 78 | 64 | 64 | 75 | 77 | 78 | 87 | 76 | 79 |
| ***Museums*** | 66 | 67 | 59 | 66 | 68 | 67 | 68 | 60 | 73 | 66 | 59 |
| ***Festivals*** | 57 | 59 | 55 | 53 | 61 | 64 | 51 | 42 | 66 | 63 | 55 |
| ***Camping*** | 49 | 48 | 45 | 51 | 50 | 36 | 67 | 51 | 37 | 47 | 58 |
| ***Attending cultural events*** | 46 | 41 | 38 | 36 | 44 | 57 | 41 | 44 | 59 | 54 | 58 |
| ***Exp. winter activities*** | 30 | 28 | 30 | 31 | 36 | 31 | 38 | 29 | 31 | 24 | 27 |

*"Now I am going to give you a list of vacation activities. For each of these activities, please tell me whether or not your holidays typically include these things.*

Other popular activities such as "attending festivals" (57% overall) was most popular in centres such as Greater Toronto (66%) and Chicago (64%) and was less frequently enjoyed by travelers from Regina (42%) and Saskatoon (51%).

"Camping" (49% overall) was most likely to be included as a vacation activity by travelers from Saskatoon (67%) and Sault Ste. Marie (58%) and least frequently experienced by those from Chicago (36%) and Toronto (37%).

Fifty-nine percent of Torontonians, 58 percent of residents from Sault Ste. Marie and 57 percent of Chicago respondents report they "attend cultural events" such as the theatre or the symphony on their holidays. This was an activity enjoyed by 46 percent of the total sample of respondents.

"Experiencing winter activities" (30% overall) was included as something respondents from Saskatoon (38%) and Denver (36%) enjoy doing while on vacation.

There are notable variations in interest in these activities across age categories. Most significantly, younger respondents are more likely to engage in "camping" (63% 18-34 years versus 29% among those 55 + years) and "experiencing winter activities like skiing and snowboarding" (45% 18-34 years old versus 13% for 55 + years of age). Likewise, older respondents were more inclined to attend "museums" (74% 55+ years versus 55% 18-34 years) and enjoy "experiencing cultural events like the theatre or the symphony (55% among 55 + years versus 42% among 18-34 year olds).

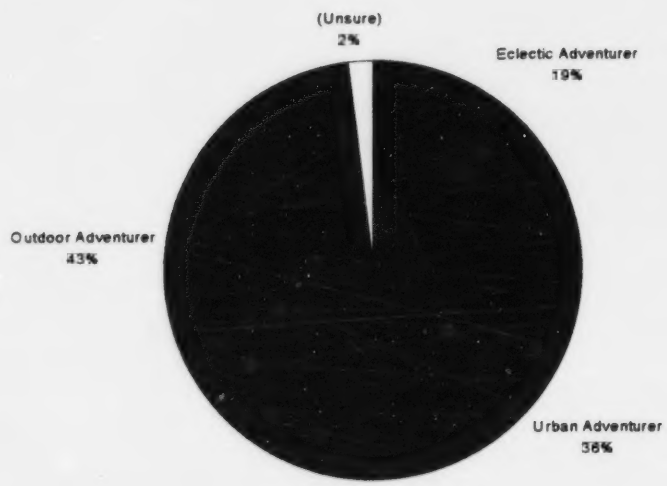
## 3.0 Urban and Outdoor Travel Segments

Those who had traveled outside of their own home province or state in the past 36 months were presented with a survey item containing two contrary attitudinal statements and were asked to choose the statement that most closely represents their own vacation activity preferences. The statements were:

- *I am an "Urban Adventurer" – I prefer to explore cities and doing things like shopping, going to the theatre and dining out.*
- *I am an "Outdoor Adventurer" – I prefer outdoor activities like exploring forests, parks, rivers, lakes and mountains.*

Respondents were also allowed to volunteer that both statements describe their vacation activity preferences. These have been designated as "Eclectic Adventurers".

### Incidence of Adventure Segments



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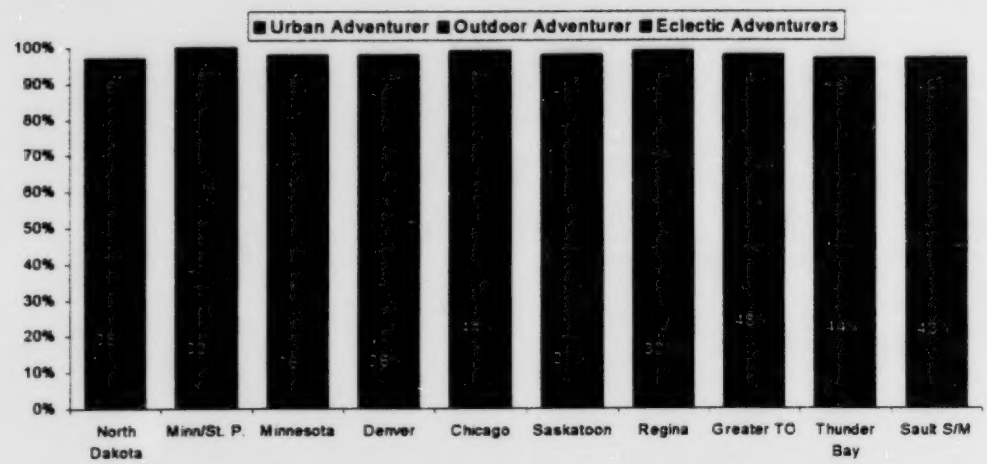
This survey item permits the segmentation of research participants along the lines of activities typically found in a city setting versus those found on a wilderness or natural setting. This differentiation of the respondent pool will permit a deeper level of evaluation of the two distinct tourism dimensions Manitoba is able to present as a vacation destination.

A somewhat greater proportion of survey participants describe themselves as Outdoor Adventurers (43%) than as Urban Adventurers (36%). One in five (19%) respondents are Eclectic Adventurers because of their claim to enjoy both Urban and Outdoor activities as part of their vacations.

Rural Minnesotans (55%) and their city counterparts in Minneapolis/St. Paul (49%) and residents of Denver (47%) and Saskatoon (47%) were most likely to view themselves as Outdoor Adventurers.

## *Travel Segments Across Markets*

*Q.13 "Which of the following two descriptions best describes the type of vacation traveler you are: I am an Urban Adventurer – I prefer to explore cities, and doing things like shopping, going to the theatre and dining out or I am an Outdoor Adventurer – I prefer outdoor activities like exploring forests, parks, rivers, lakes and mountains. Or I am a mixture of both."*



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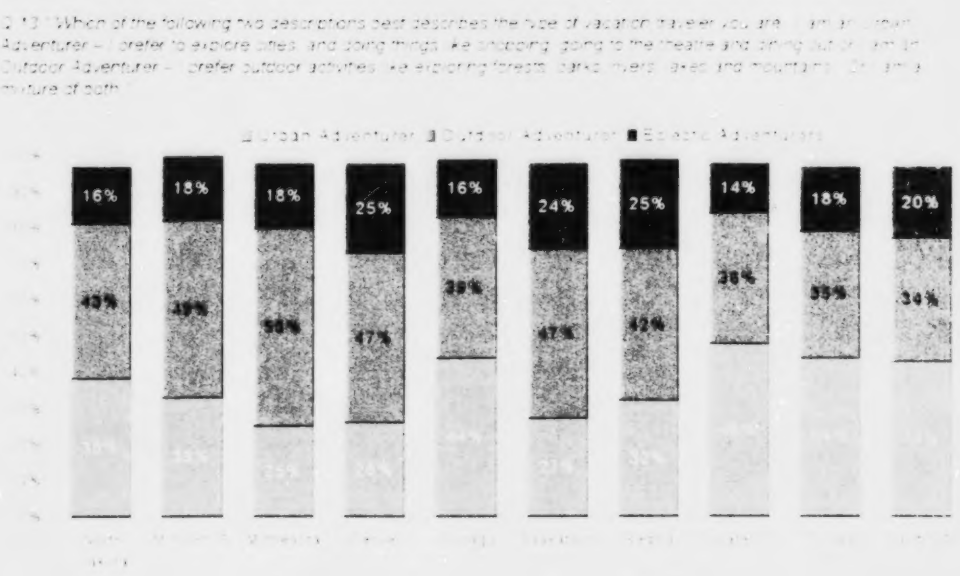
## Travel Segments Across Markets

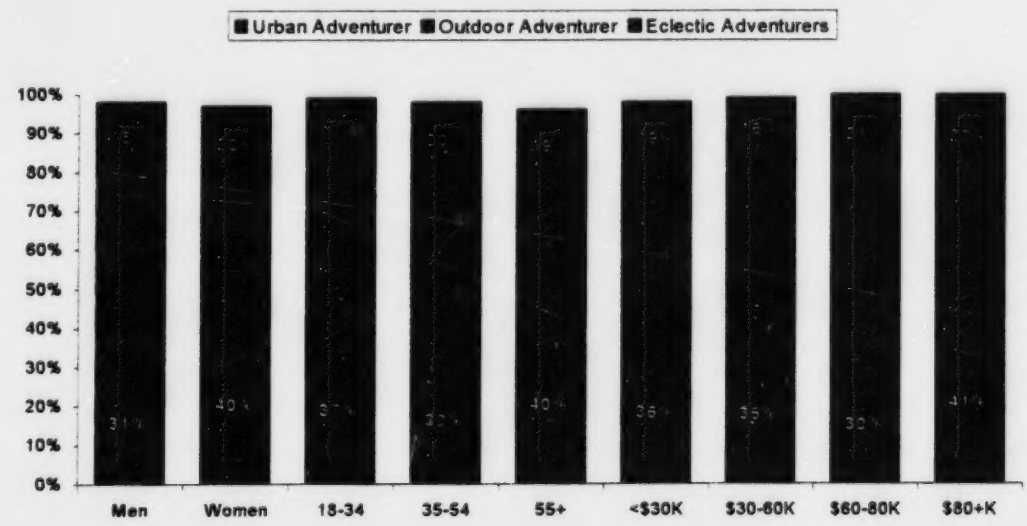


## *Socio-Demographic Profile of Travel Segments*

Virtually all American respondents (except those from Chicago) and those from Western Canada (47% Saskatoon, 42% Regina) described themselves as Outdoor Adventurers who preferred activities such as exploring forests, parks, rivers, lakes and mountains. This figure peaks at 55 percent of respondents from Minnesota and 47 percent from Denver.

This contrasts with Eastern Canadian markets who were more likely to describe themselves as Urban Adventurers with residents of Greater Toronto (48%), Thunder Bay (44%) and Sault Ste Marie (43%) showing the highest representation in this segment. Chicago was the only American market where the largest proportion of the survey population described themselves as Outdoor Adventurers, rather than Urban Adventurers.

## Socio-Demographic Profile of Travel Segments



Across socio-demographic groups, women (40% versus 31% among men), older respondents (40% over 55 years) and those earning over $80,000 annually (41%) tended to be strongly represented as Urban Adventurers.

Men (49%) were more likely than women (37%) to describe themselves as Outdoor Adventurers, as were those under 54 years (46% versus 37% among those aged over 55 years of age) and among non-visitors who would like to go to Manitoba (48% Keen) or would consider going to this province (46% Warm).

# 4.0 Awareness of Manitoba Vacation Opportunities

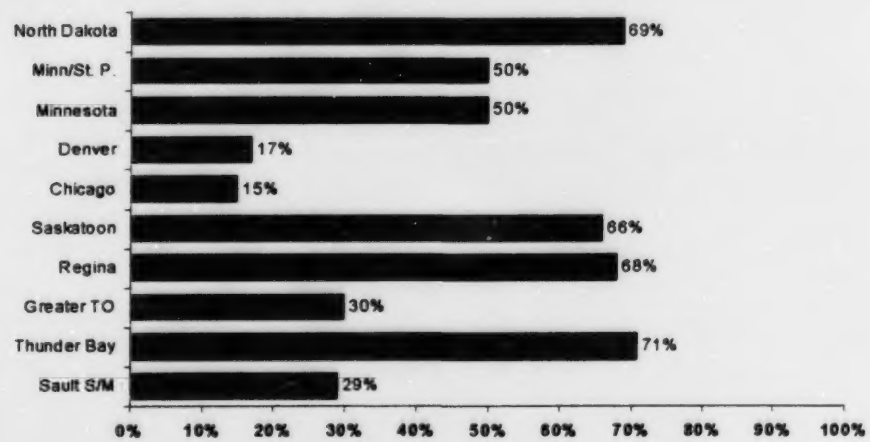
## *4.1 Familiarity With Manitoba Vacation Opportunities*

Those who had travelled outside of their home province or state in the past 36 months were asked whether they had heard of travel or vacation opportunities in Manitoba and as to the source of this information.

Approximately one-half of surveyed travelers (49%) on both sides of the Canada-U.S. border indicated that, at some point, they had seen, read or heard something about travel or vacation opportunities in Manitoba. Regionally, there is a general correlation between geographic proximity to Manitoba and self-reported awareness of vacation information, whereby those who reside in areas nearest to Manitoba such as Thunder Bay (71%), North Dakota (69%) and Regina (68%) are more likely to report Manitoba travel and vacation awareness.

***Familiarity With Manitoba Vacation Opportunities***
***- Percent Indicating "Yes" -***

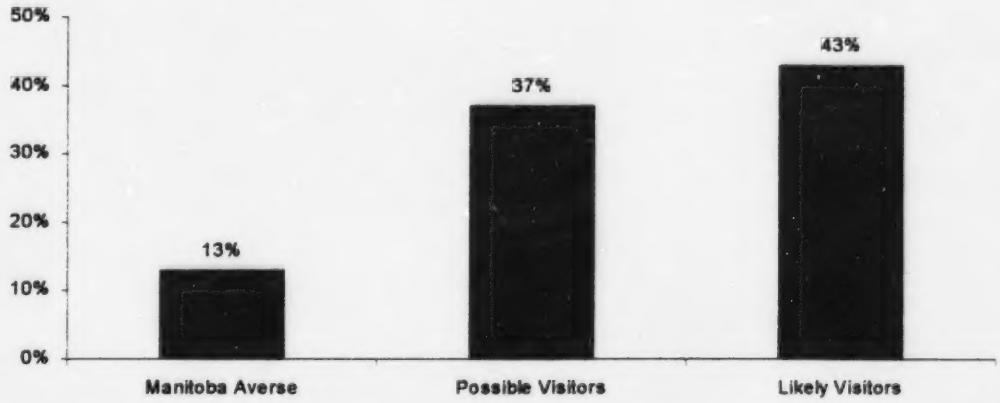
*Q.18 "Have you ever seen, read or heard anything about travel or vacation opportunities in Manitoba?"*



A weaker but similar correlation exists with respect to age, whereby older respondents (57% over 55 years) are more likely than younger survey participants (36% 18-35 years) to be familiar with Manitoba travel and vacation opportunities. Among non-visitors, those who are planning to visit Manitoba some day (43%) are much more likely than those who are averse to coming to this province (13%) to report hearing something about travel and vacation opportunities at this destination.

## Awareness of Manitoba Opportunities by Visit or Intention Group

*Q.18 "Have you seen, read or heard anything about travel or vacation opportunities in Manitoba?"*



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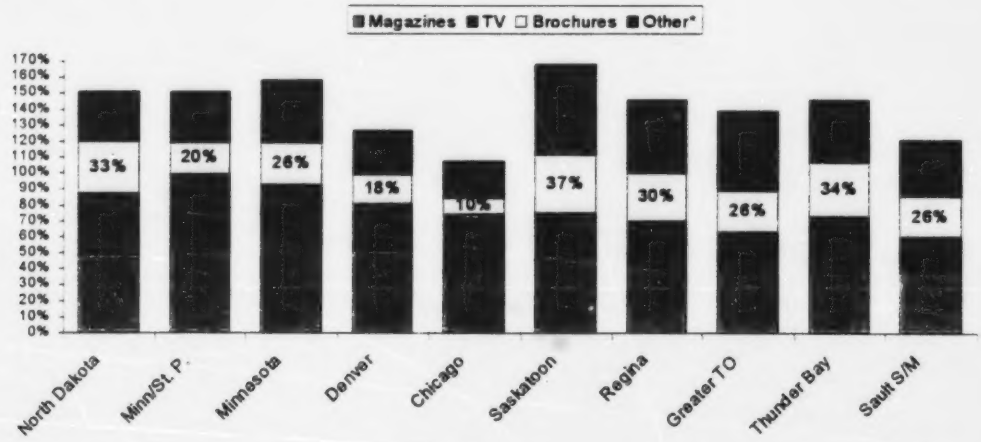
## 4.2 Sources of Manitoba Travel and Vacation Information

Among survey respondents who had heard or seen something about travel or vacation opportunities in Manitoba, the greatest number (45%) pointed to "magazines or newspapers" as their source of information. A somewhat smaller proportion volunteered "television" (35%) followed by "brochures" (29%).

Age appears to have significant influence on the source of information for travel and vacation opportunities in Manitoba. Those aged 18-34 years were much more likely to rely on television (46% versus 29% for those aged 55 + years) and the Internet (12% versus 4% over 55 years). Conversely, those aged over 55 years are much more likely to have obtained information from magazines and newspapers (49% versus 32% for 18-34 years), brochures (35% versus 26% for 18-34 years), direct mail (15% versus 7% 18-34 years) or an auto club (11% versus 3% for 18-34 years).

### Sources of Manitoba Travel Information

***Q.19 "To the best of your recollection, where did you find this information on travel in Manitoba?"***




**Multiple Responses accepted**

***Other includes Internet, Direct Mail, Travel Agent, Auto Club, Other Specified**

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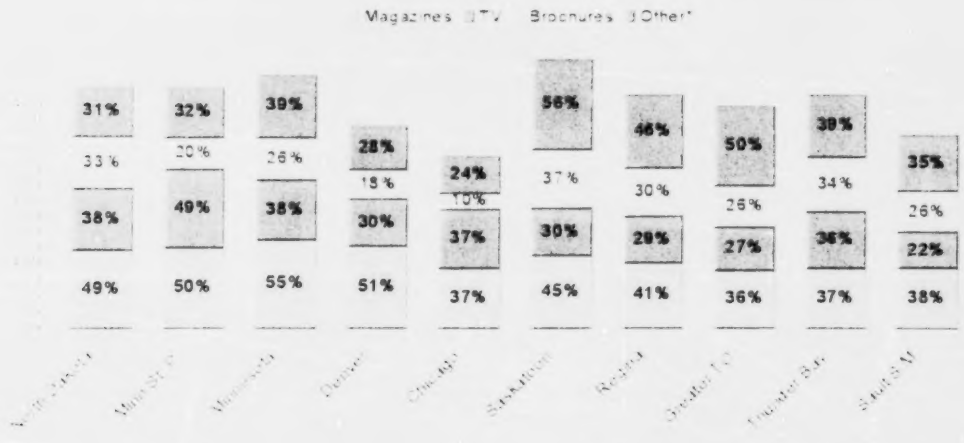


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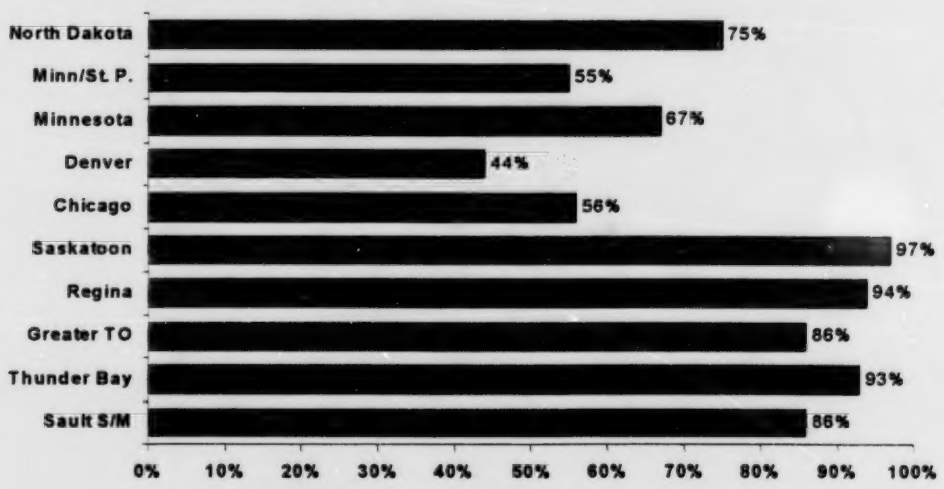
# 5.0 Canada and Manitoba Visitation Incidence

After respondents had been probed as to their past and typical travel activities, they were questioned specifically about their knowledge of and travel to Canada and Manitoba. This section will outline incidence, awareness and satisfaction dimensions with Canadian and Manitoba destinations.

## *5.1 Incidence of Canadian Vacation Visits*

Sixty-two percent of Americans in our sampling areas have taken a vacation trip to Canada at some point. Not surprisingly, neighbouring North Dakotans (75%) were the most likely Americans to have visited Canada. Manitoba's western neighbours reported the highest incidence of Canadian visitation within this country (97% in Saskatoon and 94% in Regina).

### *Canadian Vacation Visits Across Markets*



Socio-demographically, older respondents (83% over 55 years of age versus 66% among 18-34 year olds), as well as those having some university or junior college (94%) indicated they had, at some point, visited Canadian destinations. Sixty-eight percent of those respondents who had never been to Manitoba, but were keen on coming here in the future, had taken a pleasure trip to some other location in Canada.

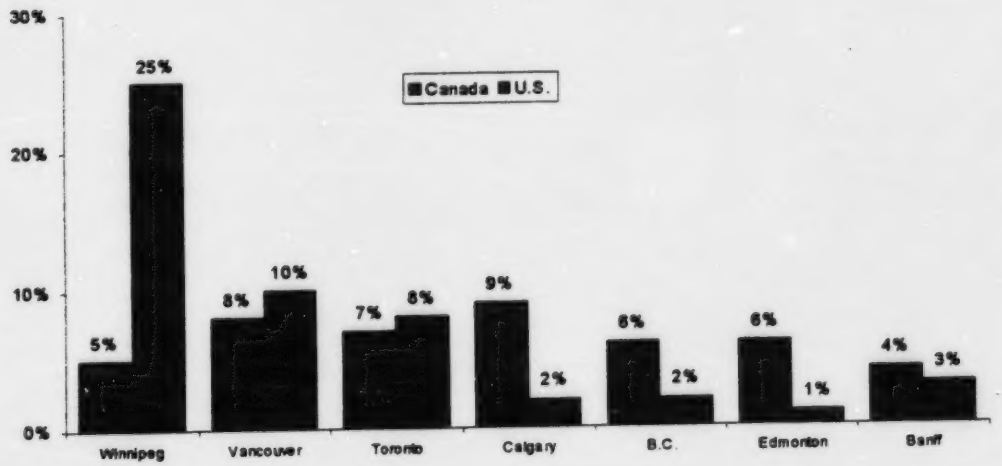
**CANADIAN DESTINATIONS**

When asked to identify their main destination in Canada on their last pleasure trip, "Winnipeg" was reported most frequently by 25 percent of Americans and five percent of Canadians, followed by "Vancouver" (8% Americans and 10% Canadians), "Toronto" (8% Americans and 7% Canadians) and "Calgary" (2% Americans and 9% Canadians).

## *Main Canadian Destination on Recent Visit*

### *- % of Pleasure Visitors to Canada -*

*Q.17 "On your last pleasure visit to Canada, what was your main destination?*



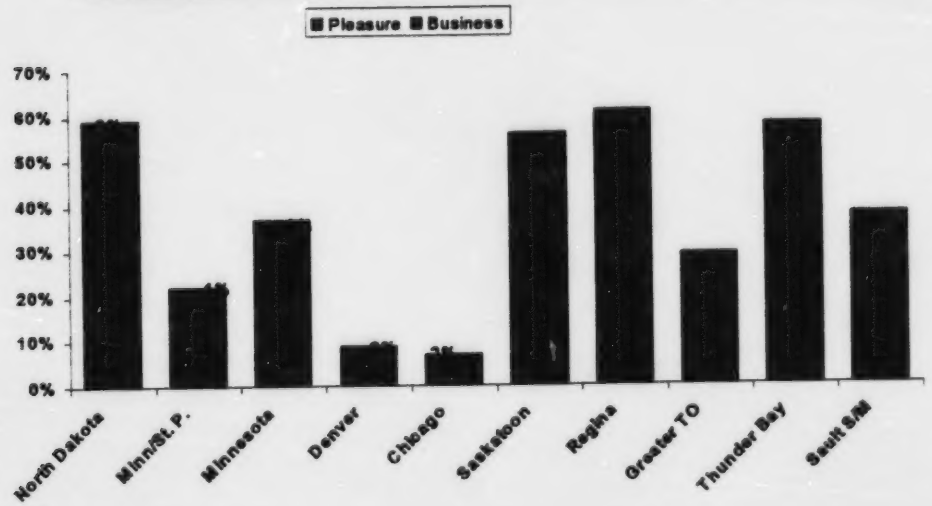
North Dakotans at 44 percent, reported Winnipeg had been their main destination for their most recent vacation, as did respondents from Minnesota (24%), Minneapolis/St. Paul (17%) and Thunder Bay (13%).

Vancouver was the last Canadian vacation spot for respondents from Denver (21%), Greater Toronto (13%) and Saskatoon (12%). Toronto was reported most frequently by respondents from Chicago (24%) and Sault Ste. Marie (16%). Calgary had been the last pleasure destination among those from Regina (15%).

### *5.2 Incidence of Manitoba Visitation and Trip Purpose*

Overall, 35 percent of respondents, although familiar with Manitoba, had never visited this province. More than six in ten (64%) U.S. respondents and one in three (33%) Canadians reported they also had never been to Manitoba. Non-visitation was the rule for virtually all of those respondents from Chicago and Denver (94% and 90% respectively).

**Purpose of Manitoba Visits**



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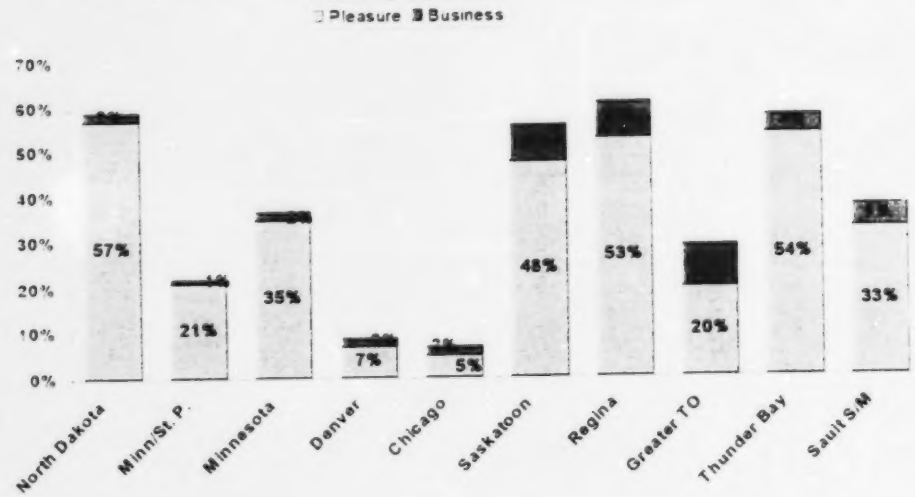
## *Purpose of Manitoba Visits*



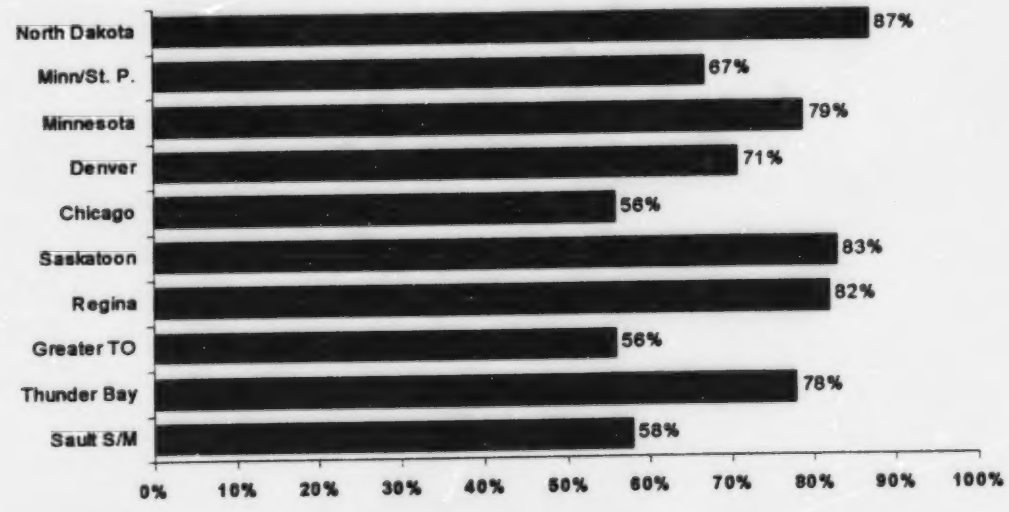
Pleasure vacations were most frequently cited as the purpose of respondents' trips to Manitoba. Among respondents who had visited Manitoba, 42 percent of Canadians and 30 percent of Americans had been here for pleasure purposes. This was most apparent among older respondents (43% over 55 years of age), and among former visitors to Manitoba (72%). The Keystone Province holds appeal as a pleasure trip destination among one-third of both major traveler segments (Urban Adventurer 36% and Outdoor Adventurer 34%).

Manitoba was the final destination (76% Canada, 82% U.S.) rather than a passing through point to another destination for the majority of respondents. Residents of neighbouring North Dakota (87%) and Saskatchewan (83% Saskatoon, 82% Regina) were most likely to cite Manitoba as the final destination of their last trip to that region. Just over one-half of those visiting Manitoba from Chicago or Toronto (56% each), started and finished their holiday in Manitoba.

## *Manitoba as a Final Destination**

### *- Percent Indicating "Final Destination" -*

*Q.23 "On your last trip to Manitoba, was this your final destination or was it more "on-the-way" to your final destination?"*




*Caution – Small samples in some markets

Among other sub-groups, younger respondents (88% among those 18-34) were most likely to report Manitoba as their ultimate destination as was the case among Urban Adventurers (82% versus 76% among Outdoor Adventurers).

For those U.S. respondents who were just passing through Manitoba on their last visit (18%), most were headed for other Canadian places such as Saskatchewan (8%), Ontario (6%) or Alberta (5%). However, Alaska was also cited by seven percent of Americans who passed through Manitoba.

Similarly, in-transit Canadian respondents, tended to be headed to such places as Ontario (11%), Saskatchewan or Calgary as well as B.C. in general (8% each) or Vancouver (7%) on their last visit through Manitoba. Very few Canadians passed through Manitoba on their way to American or other world destinations.

## *5.3 Timing, Frequency and Duration of Manitoba Visits*

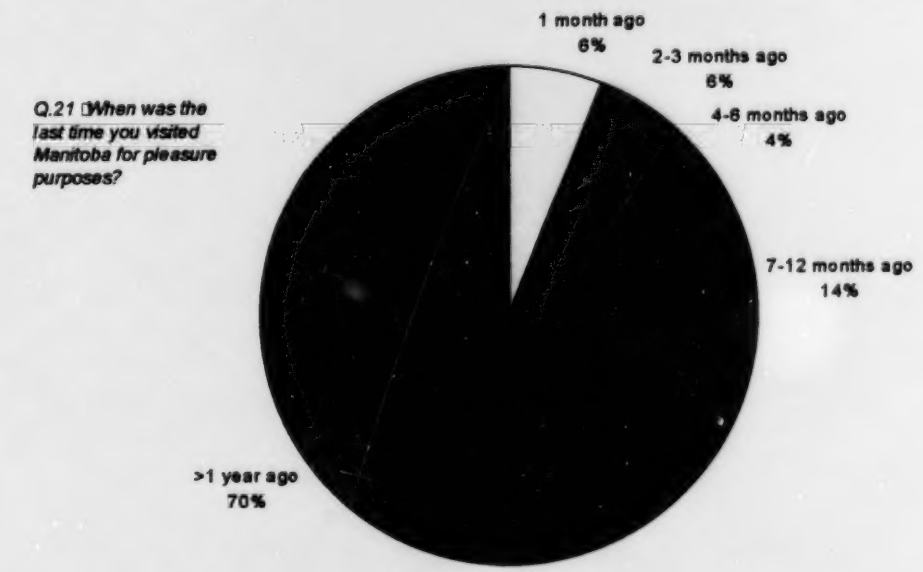
**TIMING**

For many respondents, travel to Manitoba is a fairly distant memory. Most respondents (70%) had visited Manitoba for a pleasure trip more than a year ago (64% Canada and 76% U.S.).

Only fifteen percent of Manitoba visitors had been there during the past six months, while 14 percent had visited between six months and one year ago.

Recent visitation to Manitoba (in the past 12 months) was cited most often by residents of Thunder Bay (18%) and Sault Ste. Marie (17%). Overall, younger respondents (17% among those 18-34 years of age) and those with some university (17%) were most likely to have visited for pleasure purposes within the last 12 months. Results are based on smaller sample sizes.

### *Timing of Manitoba Pleasure Visitation*



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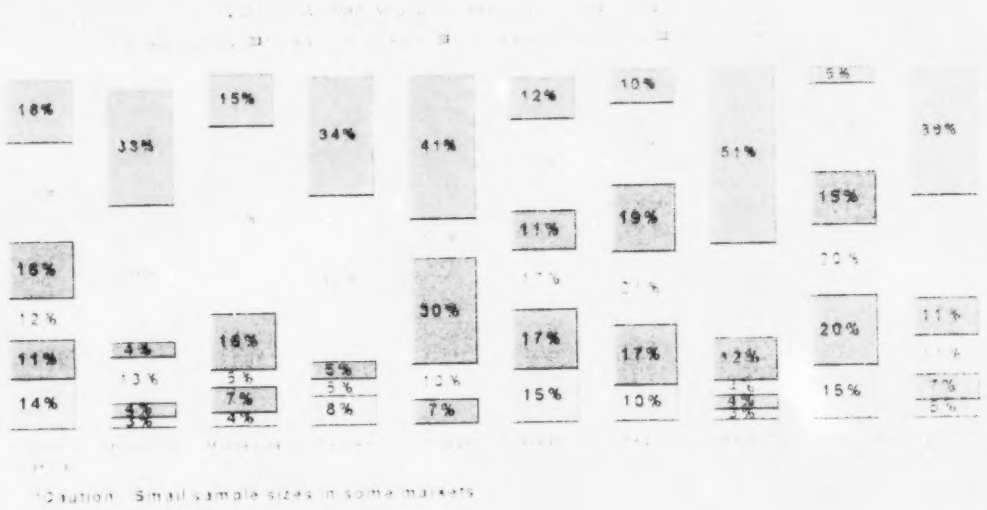
**FREQUENCY** For many of those who had visited Manitoba at some previous juncture, these trips are not a regular part of their travel routine. Indeed, in six of the ten travel markets examined, more than one-half of these former visitors said they had only been to Manitoba once or that these visits took place at only five year or longer intervals. Those visiting Manitoba most frequently, included those from Thunder Bay (15% about every 6 months), Saskatoon (15%) or North Dakota (14%).

## *Frequency of Manitoba Visits*

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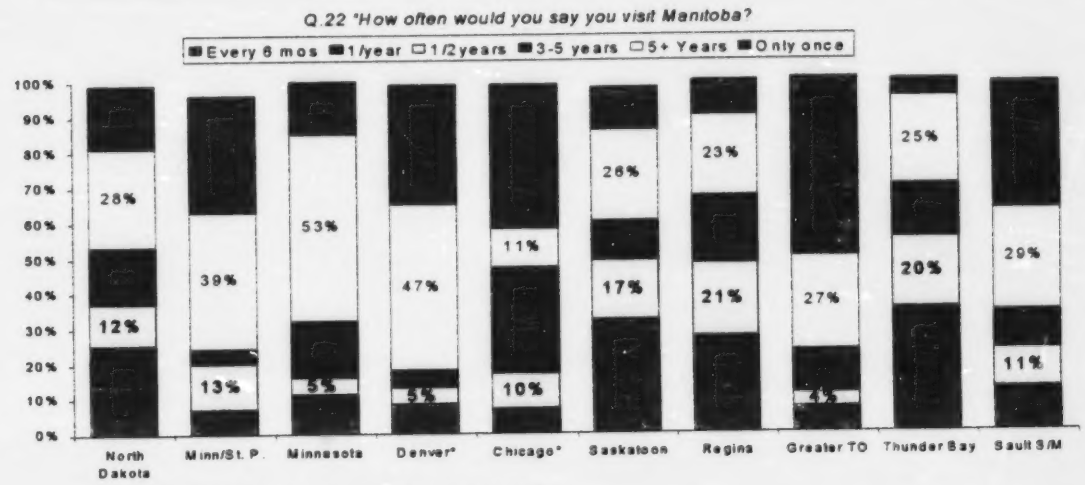


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**DURATION OF VISITS**

The duration of trips to Manitoba is generally quite brief. Overall, almost nine in ten respondents on both sides of the border report having spent one week or less in Manitoba (91% Americans versus 85% among Canadians).

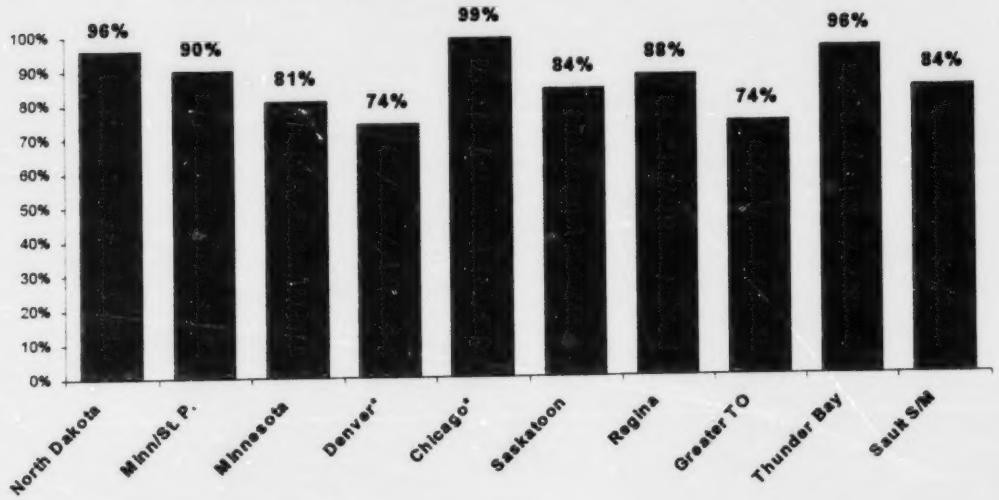
Those respondents from Saskatoon (6.28 days mean) and Sault Ste. Marie (6.62 days mean) spent the greatest number of days in Manitoba during their last trip while residents of Greater Toronto (6.10 days mean) also tended to spend relatively longer time in the province during their visits.

Lower educated respondents reported spending a mean of 9.71 days in Manitoba, compared to only 4.20 days spent among those with a university degree. Outdoor Adventurers were also more apt to spend slightly more time in Manitoba (5.15 days mean, compared to 4.82 days mean among Urban Adventurers).

## *Duration of Manitoba Visits*

### *- Percent Staying One Week or Less -*

*Q.25 "In total, how many days did you spend in Manitoba?"*

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**BREAKDOWN OF DURATION**

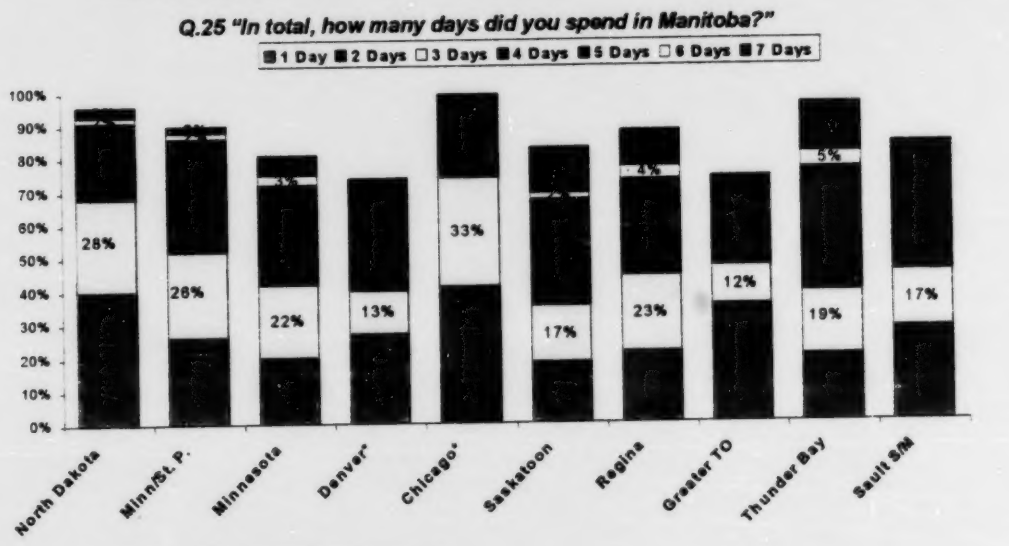
Among respondents who stayed in Manitoba for less than one week, most of them (22%) report having spent three days in Manitoba during their last visit. Four days was offered next as the length of their last visit to Manitoba (16%), followed by two days (15%) and one day (13%).

Among the geographic regions, respondents from Chicago reported staying only two (41%) or three days (33%) in Manitoba and many of those from Denver (16%) reported one day was the length of stay in Manitoba during their last trip.

Three days was the highest number of days reported during respondents' last Manitoba stay across all other sub-groups, including Outdoor and Urban Adventurers (22% each).

## *Breakdown of Duration of Manitoba Visits*

### *- Percent Staying One Week or Less -*

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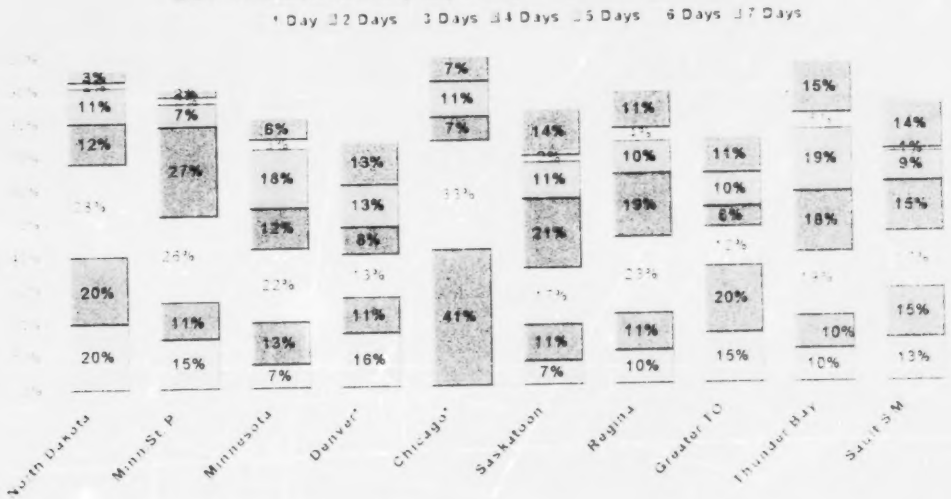


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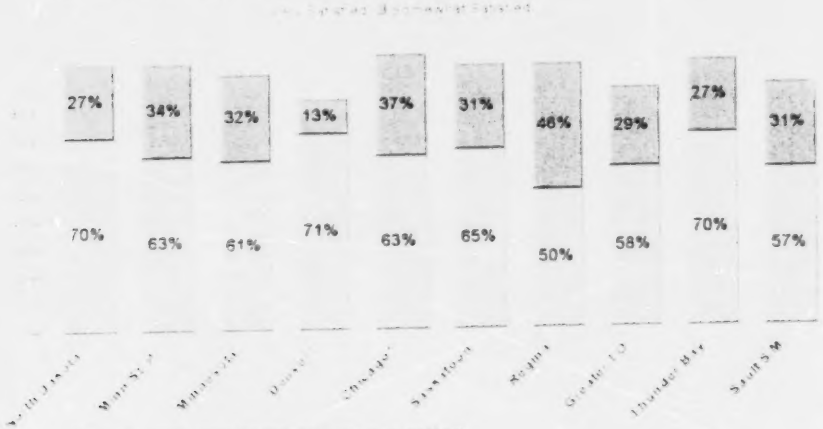
## 5.4 Trip Satisfaction and Incidence of Intended Re-Visits

**TRIP SATISFACTION**

Despite relatively infrequent visits and trips of only short duration, overall satisfaction with respondents' last trip to Manitoba was very high across all regions and sub-groups of surveyed respondents. Ninety-seven percent of visiting Americans reported being "very satisfied" (68%) or "somewhat satisfied" (29%) with their last trip to Manitoba. Similar proportions of Canadians also rated their last Manitoba trip as being "very" (66%) or "somewhat" (34%) satisfactory. The highest satisfaction ratings from visitors came from respondents from North Dakota, Denver and Thunder Bay (70%, 71%, 70%), as well as from older respondents (70% among those 55+ versus 66% among those 18-34 years) and those with higher levels of education (67% among those with a university degree). Respondents who were aware of Manitoba travel or vacation opportunities were somewhat more likely than those who were unaware to be "very satisfied" with their last trip to Manitoba (67% versus 53% respectively). Other regions, in particular Regina (50%) and Sault Ste. Marie (57%), expressed less impressive levels of high satisfaction with their latest trip to Manitoba.

### Satisfaction With Manitoba Visit

Q.26 "Overall, would you say you were very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with your last trip to Manitoba?

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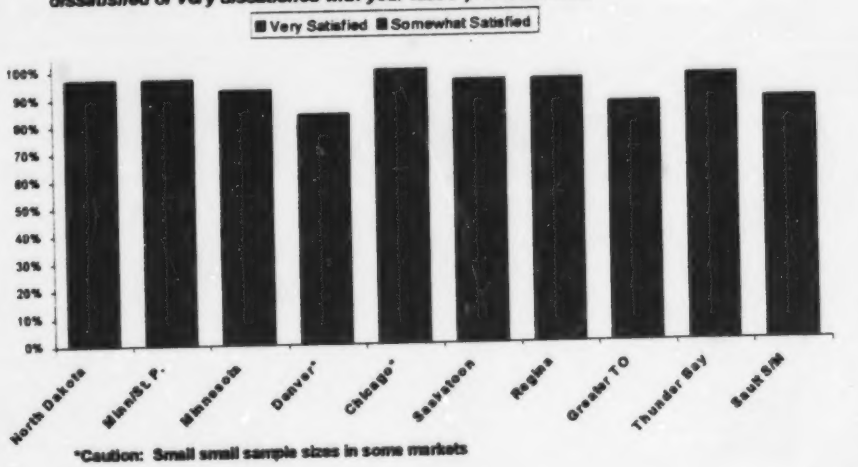
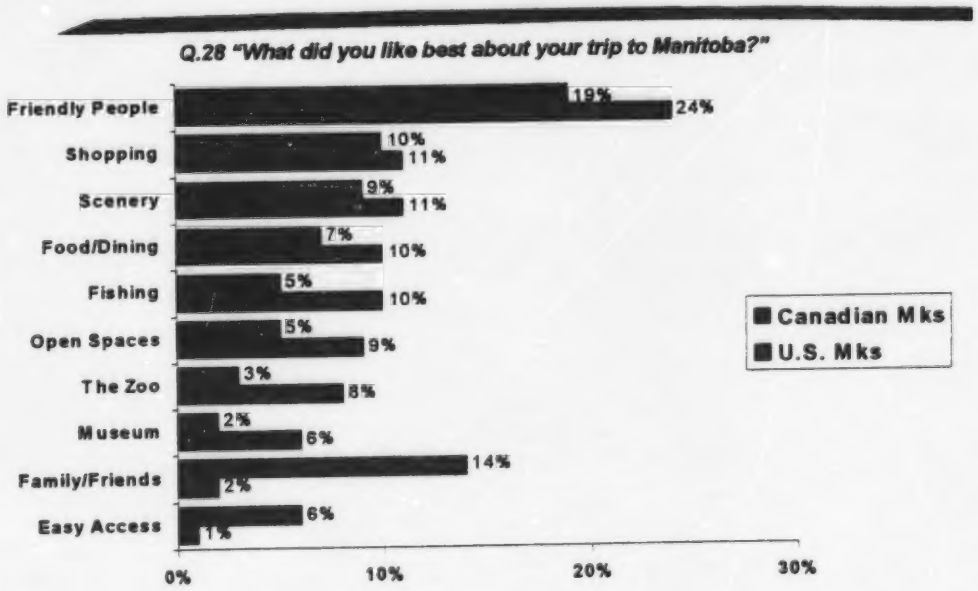
*Q.26 "Overall, would you say you were very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with your last trip to Manitoba?*



When respondents were asked what they liked most about their last Manitoba visit, 24 percent of Americans and 19 percent of Canadians reported the "friendly people". "Shopping" was also rated high with 11 percent of U.S. respondents and 10 percent of Canadians suggesting this was a Manitoba highlight. Other praised activities and amenities included "scenery" (11% U.S. and 9% Canadian), "restaurants and food" (10% U.S. and 7% Canadian) and "open spaces" (9% U.S., 5% Canadian). Not surprisingly, "seeing family and friends" rated a much higher among Canadians than among Americans (2% U.S. versus 14% among Canadians, whereas "fishing" was reported as a top trip feature among twice as many Americans than Canadians (10% versus 5%).

## Most Appealing Aspects of Manitoba Trip

**- % Visited Manitoba -**



Activities such as shopping were rated highest by respondents from Thunder Bay (17%) and North Dakota (13%). Eighteen percent of Minnesotans and 12 percent of respondents from Minneapolis/St. Paul pointed to fishing as a valued aspect of their trip to Manitoba. Survey participants from Regina and Saskatoon (16% each) as well as those from Thunder Bay (14%) liked visiting their family and friends when in Manitoba.

Women rated "shopping" (14% versus 7% among men), "the scenery " (12%) and "seeing family and friends" (11%) as among the things they liked best about their trip to Manitoba. Men rated the "friendly people" (20%) as something they liked about their last trip as well as "open spaces" (9%), "fishing" (8%) and the "scenery" (8%) more often than their female counterparts.

Urban Adventurers liked "friendly people" (19%), "shopping" (14%), "restaurants and food" (11%) and seeing family and friends (10%). Outdoor Adventurers, on the other hand, singled out the "friendly people" as well (23%), but rated more natural features like the "scenery" (11%), "open spaces" (9%) and "fishing" (8%) as some of their most favoured features of Manitoba.

**INTENDED RE-VISITS**

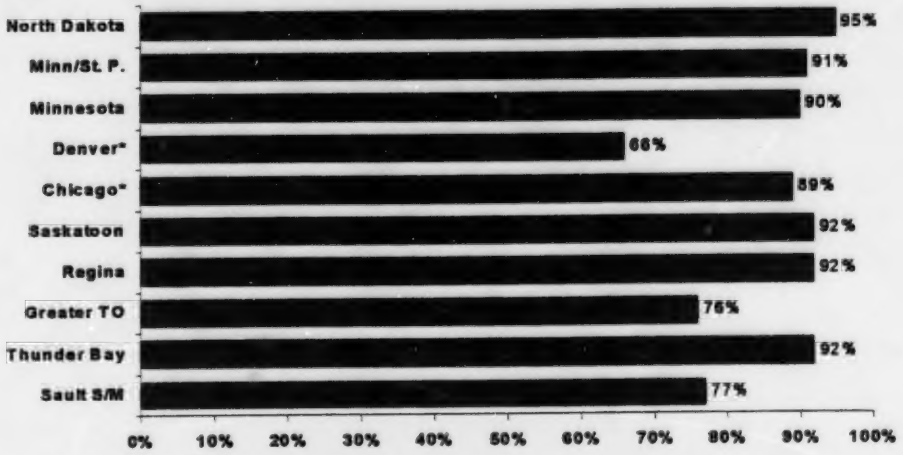
The high satisfaction reported by all respondents was solidly affirmed from the positive responses to a question that asked respondents if they would take another trip to Manitoba. Ninety-two percent of Americans and 88 percent of Canadians responded affirmatively that they would return to Manitoba for a visit. The strongest levels of intended visitation came from North Dakota (95%) and Saskatoon, Regina and Thunder Bay (92% each). However, one in five (20%) respondents from Thunder Bay and 18 percent of those from Greater Toronto did not think they would be returning to Manitoba in the future.

Younger respondents (95% among 18-34 years olds) were much more likely than their older counterparts (86% among 55+) to say they would re-visit Manitoba, as were those who were attracted to Manitoba because of the comparative value of the Canadian dollar (92% versus 88% among those not dollar driven).

# Incidence of Intended Re-Visits

**- Percent Indicating "Yes" -**

**Q.27 "Would you take another trip to Manitoba?"**




*Caution: Small samples in some markets

## 6.0 Manitoba Travel Market Potential

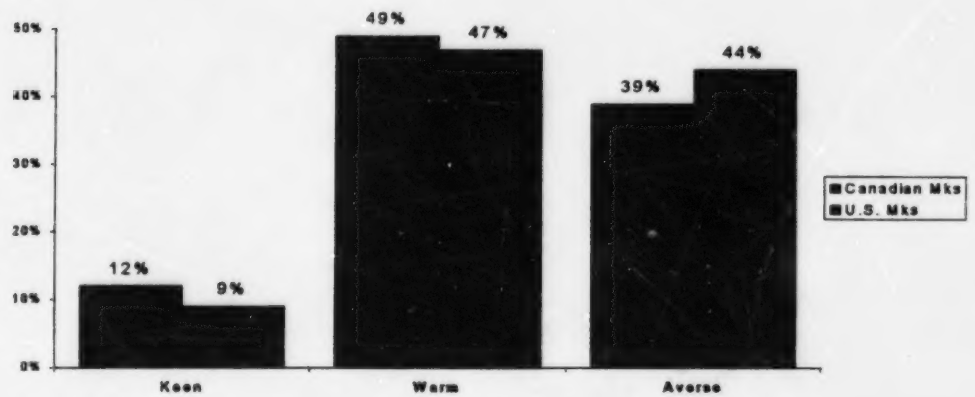
Survey respondents were presented with a line of enquiry that permits an assessment of the potential expansion of the Manitoba destination market.

In this section of the research, those who had not yet visited Manitoba were asked to indicate the likelihood of a future visit. Specifically, respondents were asked to identify which of the three following statements most closely reflects their own view.

- *Manitoba is a place I have always wanted to go and will probably visit there one day.*
- *There are many places I'd like to visit and Manitoba is just one option among many.*
- *I am not really very interested in visiting Manitoba and doubt I'll ever visit it.*

Overall, nearly half (47%) of non-visitors to Manitoba regard Manitoba as a destination option among many, while nearly as many (43%) have little interest in ever visiting this province. Fully one in ten (10%) however, regard Manitoba as a likely future destination.

***Overall Likelihood of Manitoba Visit Among Current Non-Visitors***



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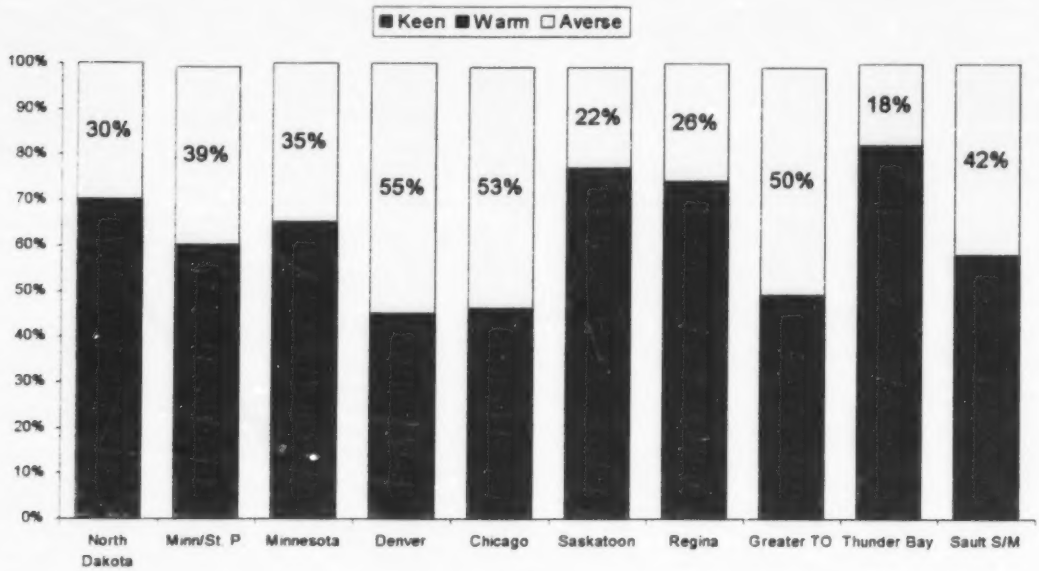
Regionally, non-visitors most inclined to come to this province originate from North Dakota (18%). Conversely, Manitoba is seen as an unlikely destination by a majority of people in Denver (55%), Chicago (53%) and Greater Toronto (50%).

## Potential Visitation Segments




Significantly, those who found Canadian travel destinations more attractive because of the strength of the US dollar (See Chapter 10) are more likely to report they plan to visit Manitoba sometime (14% versus 5% among those whose travel destinations are unaffected by the exchange on the dollar) or to consider Manitoba as one among many destinations (56% versus 40%)

A correlation is evident between income and desire to visit Manitoba whereby the lower the household income of respondents, the greater the likelihood that non-visitors expressed interest in visiting this province some day (12% for those earning less than $30,000 versus 5% for those earning over $80,000).

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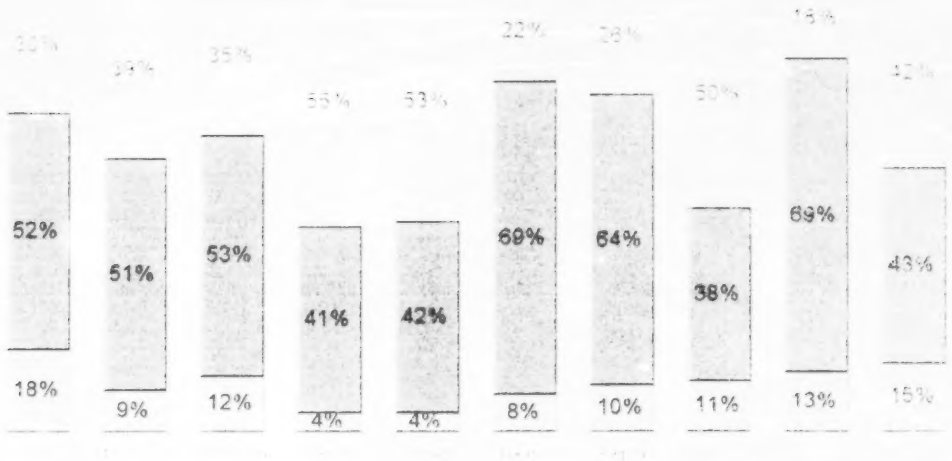
## Potential Visitation Segments




Significantly, those who found Canadian travel destinations more attractive because of the strength of the U.S. dollar (See Chapter 10) are more likely to report they plan to visit Manitoba sometime (14% versus 5% among those whose travel destinations are unaffected by the exchange on the dollar) or to consider Manitoba as one among many destinations (56% versus 40%).

A correlation is evident between income and desire to visit Manitoba whereby the lower the household income of respondents, the greater the likelihood that non-visitors expressed interest in visiting this province some day (12% for those earning less than $30,000 versus 5% for those earning over $80,000).

# 7.0 Profile of Interested and Return Visitors

## *7.1 Profile of Likely Visitors*

A profile of potential Manitoba visitors can be created by examining the characteristics of respondents who categorize themselves as interested in visiting Manitoba in the future. In the interests of statistical reliability, the non-visitors described in this report as "keen" and "warm" towards the idea of visiting Manitoba have been combined to form a single sufficiently robust group.

Although the statistical reliability of sub population analysis has been enhanced by combining keen and warm respondents, it is still not possible to examine, in a meaningful way, these results in individual markets as far fewer than 100 cases form the sample base in any market. Nonetheless, insight into the socio-demographic and media utilization characteristics of these critical respondents can be gleaned by examining these results in "Canada" (124 cases) and "U.S." (287 cases) groups. This provides a basis for making more accurate profiles and also allows data consumers to appreciate inter-country profile differences. The table on the next page shows the socio-demographic and media utilization profiles of keen/warm respondents in both Canada and the United States. Additional columns have been added in each country to juxtapose likely visitors with the profile of travelers who have visited Manitoba in the past and intend to make another trip to this province in the future.

Key characteristics of Canadian and American likely visitors include the following:

- Canadian keen/warm respondents are somewhat younger, less affluent and, especially, less well educated than their American keen/warm counterparts.

- Canadian keen/warm respondents tend to present themselves as "Urban Adventures" while the dominant segment within U.S. keen/warm markets is the "Outdoor Adventurer".

- American keen/warm respondents tend to use word-of-mouth, magazine and newspaper articles and ads, and the Internet slightly more than Canadians when planning vacations.

- In both Canada and the U.S., keen/warm respondents are younger than those who have actually visited Manitoba.

- In the U.S., keen/warm respondents are somewhat more affluent and slightly better educated than former U.S. visitors to Manitoba. In Canada, the opposite is true, with former Manitoba visitors being somewhat more affluent and highly educated than those who are keen/warm towards a Manitoba vacation.

## PROFILE OF PAST AND LIKELY VISITORS BY COUNTRY

| | Canadian Warm/Keen (374) (%) | Canadian Returns (124) (%) | U.S. Warm/Keen (265) (%) | U.S. Returns (287) (%) |
|---|---|---|---|---|
| **GENDER** | | | | |
| *Men* | 48 | 53 | 45 | 47 |
| *Women* | 52 | 47 | 55 | 53 |
| **AGE** | | | | |
| *18-34* | 44 | 29 | 32 | 20 |
| *35-54* | 37 | 45 | 47 | 39 |
| *55+* | 19 | 26 | 21 | 41 |
| **INCOME** | | | | |
| *$<30K* | 21 | 14 | 17 | 20 |
| *$30-60K* | 31 | 28 | 32 | 35 |
| *$60-80K* | 17 | 21 | 19 | 14 |
| *$80K+* | 16 | 23 | 22 | 14 |
| **EDUCATION** | | | | |
| *High School* | 42 | 32 | 23 | 26 |
| *Post-Secondary* | 33 | 36 | 29 | 31 |
| *University Grad* | 25 | 32 | 48 | 43 |
| **SEGMENTS** | | | | |
| *Urban* | 45 | 34 | 28 | 37 |
| *Outdoor* | 38 | 44 | 49 | 46 |
| *Eclectic* | 17 | 23 | 22 | 17 |
| **MAJOR INFORMATION SOURCES** | | | | |
| *Word-of-mouth* | 85 | 88 | 91 | 94 |
| *Brochures* | 70 | 73 | 70 | 80 |
| *Magazines/Newspaper Articles* | 61 | 49 | 70 | 70 |
| *Newspaper Ads* | 53 | 55 | 57 | 61 |
| *Internet* | 41 | 46 | 49 | 44 |

## 7.2 Profile of Return Visitors in Key Markets

A special analysis of respondents has been conducted in markets with sufficient sample bases to examine the socio-demographic and media utilization patterns of former visitors.

The table below reveals the percentage of respondents in these markets who have visited Manitoba in the past and intend to come to this province again.

**PROFILE OF RETURN VISITORS IN KEY MARKETS**

| | All Regions (638) (%) | N.D. (174) (%) | Saskatoon (98) (%) | Regina (110) (%) | Thunder Bay (95) (%) |
|---|---|---|---|---|---|
| **GENDER** | | | | | |
| *Men* | 51 | 45 | 48 | 60 | 52 |
| *Women* | 49 | 55 | 52 | 40 | 48 |
| **AGE** | | | | | |
| *18-34* | 25 | 24 | 26 | 36 | 24 |
| *35-54* | 43 | 38 | 42 | 44 | 47 |
| *55+* | 32 | 38 | 32 | 20 | 29 |
| **EDUCATION** | | | | | |
| *High School* | 30 | 26 | 37 | 30 | 30 |
| *Post Secondary* | 33 | 34 | 32 | 40 | 39 |
| *University Grad* | 37 | 40 | 31 | 30 | 31 |
| **SEGMENTS** | | | | | |
| *Urban* | 35 | 41 | 28 | 28 | 43 |
| *Outdoor* | 44 | 45 | 51 | 46 | 37 |
| *Eclectic* | 20 | 14 | 21 | 27 | 21 |
| **MAJOR INFORMATION SOURCES** | | | | | |
| *Word-of-mouth* | 90 | 95 | 91 | 87 | 85 |
| *Brochures* | 76 | 80 | 69 | 69 | 79 |
| *Magazine/Newspaper Articles* | 64 | 70 | 54 | 52 | 68 |
| *NewspaperAds* | 58 | 63 | 49 | 52 | 66 |
| *Internet* | 45 | 45 | 34 | 53 | 43 |

Critical features of the profile of former Manitoba visitors in key markets include the following:

- Former visitors to Manitoba from Regina tend to be over-represented as men (60% versus 40% for women) while in North Dakota, a higher proportion of women constitute the pool of former visitors.

- Former visitors from Regina tend to have the largest proportion of younger respondents while North Dakota's visitors are older than those from other markets.

- Visitors from Saskatoon possess a somewhat lower level of education while North Dakotans were most educated.

- Visitors from Thunder Bay were the only former visitors to have the largest proportion of respondents as "Urban Adventurers". "Outdoor Adventurers" vastly outnumber their city-oriented counterparts in Saskatoon and Regina although former visitors from Regina also have a relatively large representation of "Eclectic" visitors.

# 8.0 Key Dimensions of Manitoba Tourism

Survey respondents were presented with a detailed list of features and amenities to be found in Manitoba. In the first instance, respondents were asked to evaluate the importance of the feature or quality. In the second instance, they were asked whether they thought Manitoba possessed these features. Paralleling these lines of enquiry on identical items permits a bivariate analysis of Manitoba tourism assets and opportunities.

## *8.1 Perceived Importance of Selected Tourism Amenities*

In terms of high importance four categories of features and amenities emerged from the findings. Top tier importance items included those to which respondents clearly attached a high level of importance. They included such things as:

- "Going to a place that is very clean and well cared for" (90% "very important")
- "Going to a place that is very safe for visitors" (86%)
- "Beautiful scenery" (71%)
- "Being in a place with good roads and highways" (70%)

Second tier importance items included:

- "Going to a place with lots of things for families to see and do" (58%)
- "Mild summertime weather" (57%)
- "A wide variety of accommodations" (54%)

Third tier items included:

- "An abundance of natural lakes" (44%)
- "High quality resorts" (32%)
- "Having access to sandy beaches" (31%)

The final and lowest ranked tier of features and amenities included:

- "Having access to great hunting and fishing" (21%)
- "Attending summer festivals and events" (19%)
- "Having access to quality inexpensive golf courses" (15%)
- "Hiking" (15%)
- "Being in a place that is very isolated and remote" (13%)
- "Attending sports events" (12%)

## 8.2 Possession of Selected Tourism Amenities

Survey respondents were represented with the same list of features and amenities and this time asked to state whether they felt Manitoba possessed these qualities. Once again four categories emerged.

In the first category there was a general consensus that:

- "Manitoba has beautiful scenery" (61% agree)
- "Manitoba has abundant natural lakes" (58%)
- "Manitoba has lots of things for families to see and do" (58%)
- "Manitoba is very clean and well cared for" (57%)
- "Manitoba has mild summertime weather" (56%)
- "Manitoba is a very safe place for visitors" (55%)

In the second category were items where there was some uncertainty as to whether or not Manitoba indeed possessed these qualities. This included features and amenities such as:

- "Manitoba is very isolated and remote" (51%)
- "Manitoba has a wide variety of accommodations" (50%)
- "Manitoba has great hunting and fishing" (49%)
- "Manitoba has good roads and highways" (48%)

The third category included items that most doubted this province possessed such as;

- "Manitoba has many summer festivals and events" (38%)
- "Manitoba is a place with great resorts" (37%)
- "Manitoba is great for hiking" (37%)

The fourth and lowest category included items that an even smaller minority of research participants felt Manitoba possessed such as:

- "Manitoba has many sandy beaches" (30%)
- "Manitoba has a lot of sporting events to attend" (28%)
- "Manitoba has many quality inexpensive golf courses" (17%)

# 9.0 Quadrant Analysis

## *9.1 Explanation of Quadrant Analysis*

By comparing the perceived value of features and amenities directly against the degree to which Manitoba is believed to possess these qualities, it is possible to graphically illustrate the areas that should be emphasized in promoting the province in the markets included in this study. To achieve a deeper level of understanding, a bivariate quadrant analysis has been conducted for both Canadian and American markets.

The vertical axis of each country's graph depicts the level of importance travelers assign to each of a list of features and amenities. The higher up the vertical axis, the greater the importance of this feature or amenity to the traveling public.

The horizontal axis of each country's graph depicts the extent to which Manitoba is perceived to possess the feature or amenity. The further to the right along the horizontal axis, the greater the degree to which this feature or amenity is associated with Manitoba.

The four quadrant grid that has been imposed on the graph, has been determined by calculating average score of "very important" responses on this vertical scale, and the average score of the percentage of respondents who agree that Manitoba possesses this feature or amenity.

The resulting quadrant grid allows the reader to consider Manitoba's perceived strengths and weaknesses in light of their importance to potential visitors.

Respondents were able to assign a level of importance to each of the amenities and features being tested. On average, fewer than one percent of respondents were unable or unwilling to attach some level of importance to the item in question. However, a key finding of this research is that on average a majority of respondents (51%) were unable or unwilling to agree or disagree whether Manitoba possessed the feature or amenity in question.

The strategic implications associated with quadrant positioning are outlined briefly.

**Critical Asset**

Located in the top right section of the graph, items in the "critical asset" quadrant are features and amenities that are not only important considerations when selecting a vacation destination, they are also seen to exist in Manitoba. It is desirable to have as many features as possible located in this quadrant.

**Critical Opportunity**

Located in the top left section of the graph, items in the " critical opportunity" quadrant are features and amenities which are important vacation destination considerations, but are not generally thought to exist in Manitoba.

Normally, it is desirable to undertake promotional efforts that would facilitate moving items located in this quadrant to the "critical strength" quadrant. However, none of the items on the very extensive list of selected features and amenities was regarded as important but unavailable in Manitoba in the U.S. and Canadian composite grids. Some opportunities emerged, however, when examining Chicago, Toronto and Denver independently.

**Diminished Asset**

Located in the lower right section of the graph, items in the "diminished asset" quadrant are features and amenities which are seen to exist in Manitoba, but are not generally regarded as an important consideration when selecting a vacation destination. The challenge with respect to items in the quadrant is to convince the traveling public of the importance of these features.

**Diminished Opportunity**

Located in the lower left section of the graph, items in the "diminished opportunity" quadrant are features and amenities that are neither important nor seen to exist in Manitoba. Items in this quadrant represent the most significant challenge, as large proportions of vacationers must be convinced that these features and amenities are important and that Manitoba possesses these items.

There was a considerable degree of consistency between Canadian and American responses to the various amenities and features that were tested.

## 9.2 International Comparison of Bivariate Quadrant Analysis

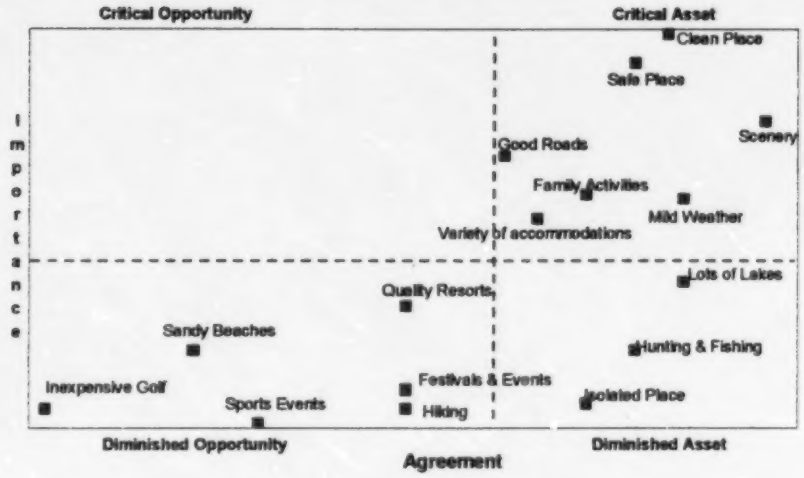
An analysis of responses from residents of both Canadian and American centres participating in the research, position "clean place" "safe place", "good roads", "scenery", "family activities", "variety accommodations" and "mild weather" in the critical assets quadrant. Canadian respondents also included "abundant natural lakes" in this key attitudinal quadrant.

Canadians and Americans alike identified no critical weakness from the list of items presented to them. In other words, from the list of items presented to respondents, there are no features or amenities of great importance that Manitoba is not seen to possess.

There was agreement on both sides of the border that being an "isolated place" constituted an undervalued asset. However, Americans were more likely than Canadians to also place "abundant natural lakes" and "hunting and fishing" in this quadrant.

Although there was some variation between Canadians and Americans on the degree to which items are classified as undervalued deficiencies, residents of both countries placed "sandy beaches", "quality resorts", "festivals and events", "hiking", "sports events" and "quality inexpensive golf" in this quadrant.

## *Tourism Amenities' Importance Analysis - U.S. Markets -*




## *Tourism Amenities' Importance Analysis - Canadian Markets -*

## *9.3 Analysis of United States Markets*

Potential for marketing some specific Manitoba features and amenities lies within virtually all regions of the United States surveyed, particularly where Manitoba is less familiar as a destination spot. Inexpensive golf, sports events and hiking ranked low in importance and agreement in all regions.

**NORTH DAKOTA**

North Dakota most closely resembles the overall U.S. analysis. Once again, assets such as "clean place", "safe place", "good roads", "scenery", "family activities", "mild weather" and "variety of accommodations" were identified as critical assets. There are no features or amenities of great importance that are lacking in Manitoba.

### *Tourism Amenities' Importance Analysis - North Dakota -*

**MINNEAPOLIS / ST. PAUL**

Residents from this area of the United States are less likely to be looking for quality resorts, inexpensive golf, hiking, sports events or even sandy beaches when planning their vacation. They are in high agreement that Manitoba is a clean and safe place and this is extremely important to them. Also, beautiful scenery is something they say Manitoba has that is also important in a vacation destination. Good roads are something that they rank as having high importance, but are less convinced that Manitoba possesses.

## *Tourism Amenities' Importance Analysis - Minneapolis/St. Paul -*

**MINNESOTA**

Minnesotans also want a clean and safe place to vacation at and rank these features along with scenery as being very important as well as something they believe Manitoba possesses. "Good roads" and "variety of accommodations" are what respondents from Minnesota (other than Minneapolis/St. Paul) desire on their vacation, but do not know that Manitoba has both of these features and amenities. Surprisingly, although hunting and fishing is something they agree Manitoba has, they do not find this as important a vacation feature as scenery, mild weather and lots of lakes.

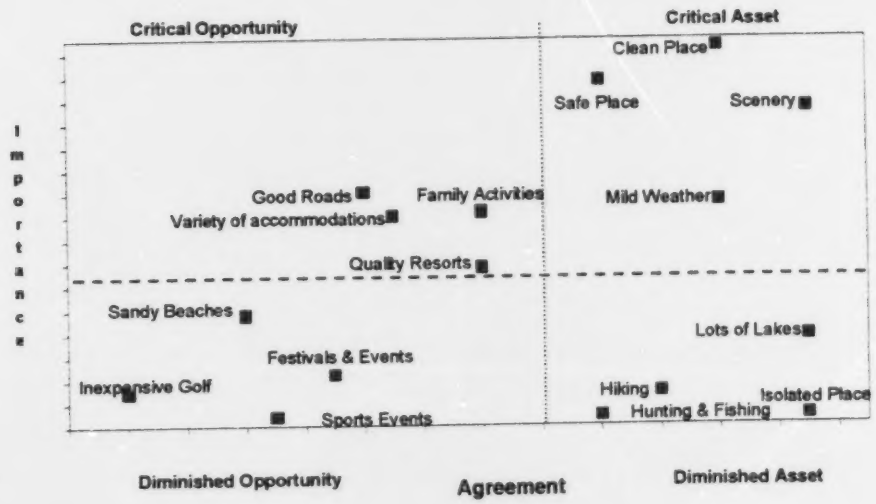
## *Tourism Amenities' Importance Analysis - Minnesota -*

**DENVER** As was the case in Minnesota, "good roads", and a wide "variety of accommodations" are what respondents from Denver are looking for in a vacation destination but which these respondents are unaware Manitoba possess. Also on their list was "family activities".

## *Tourism Amenities' Importance Analysis - Denver -*

**CHICAGO** Several features and amenities are seen to be critical opportunities for Manitoba in this marketplace. As well as their vacation destination having "good roads", a wide "variety of accommodations" and "family activities", these respondents also look for "quality resorts" although they do not generally agree that Manitoba offers these amenities.

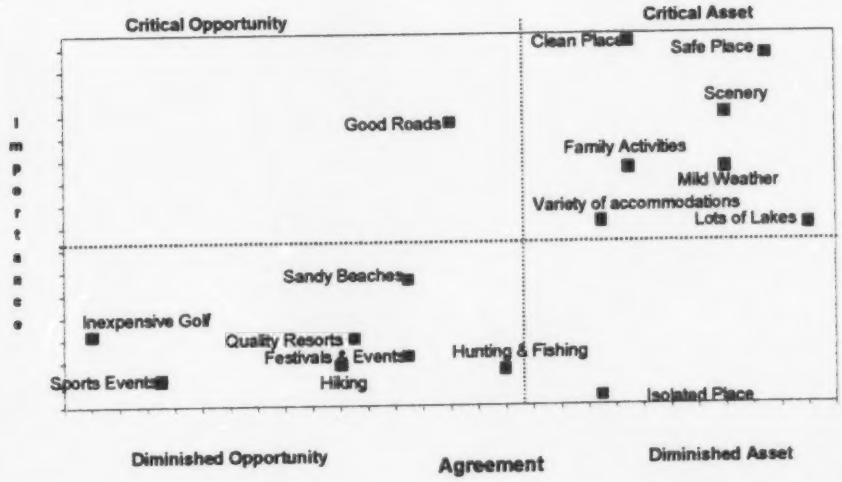
## *Tourism Amenities' Importance Analysis - Chicago -*



## *9.4 Analysis of Canadian Markets*

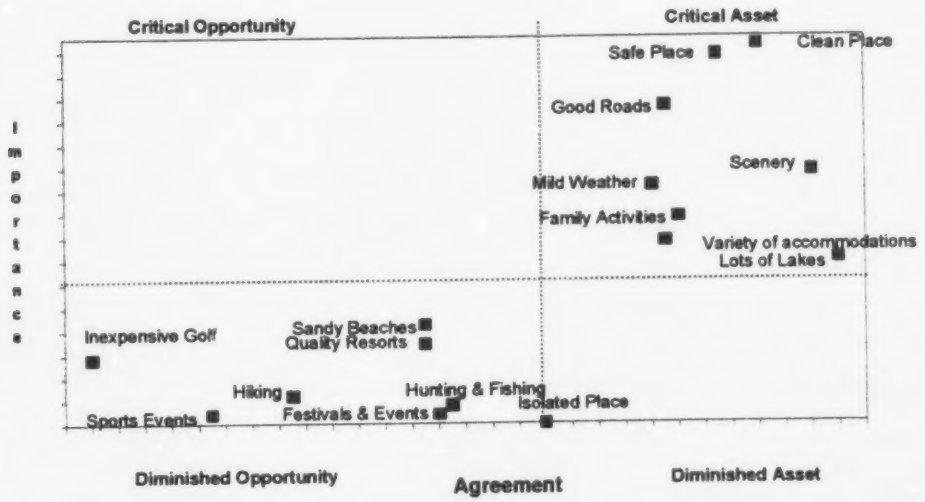
**SASKATOON** Respondents from Saskatoon do not find quality resorts an important aspect of a vacation destination and tend instead to look for places that have scenery, mild weather, family activities, lots of lakes, is clean and safe and has a wide variety of accommodations. Good roads are something that these Saskatchewan respondents find important as a destination attribute, but do not necessarily agree is present in Manitoba.

***Tourism Amenities' Importance Analysis***
***- Saskatoon -***



**REGINA** Respondents in Regina rank a clean and safe place, good roads, mild weather, and scenery as something very important for their vacation destination to have and highly agree that Manitoba possesses. Also in this quadrant of high agreement, but somewhat less important is family activities, a variety of accommodations and lots of lakes. These Saskatchewan residents do not think hunting and fishing, festivals, sports events and hiking are very important features and amenities for a vacation destination and also give low agreement marks to the fact that Manitoba has them.

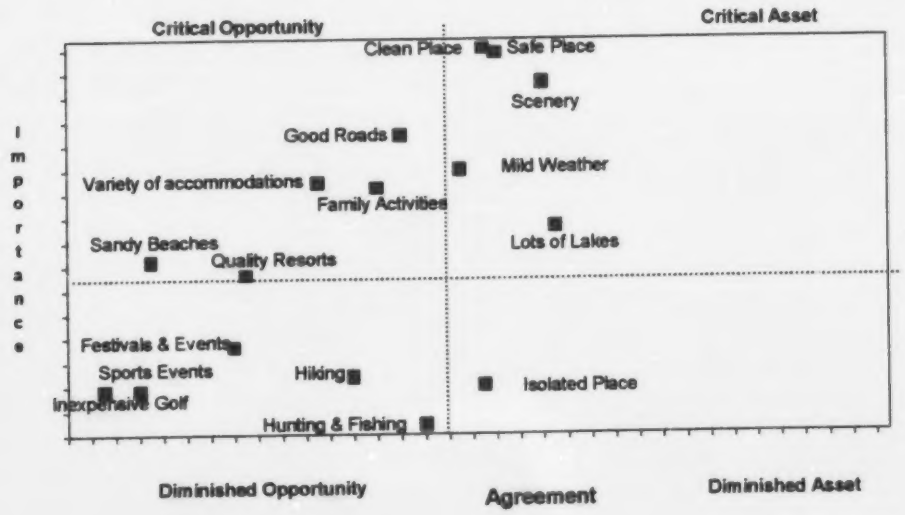
## *Tourism Amenities' Importance Analysis*
## *- Regina -*



**GREATER TORONTO**

Toronto offers significant opportunity in the sense that a crowded list of items appear in the key top left quadrant. Fewer respondents from Greater Toronto agreed that Manitoba had scenery and is a clean and a safe place, even though the importance of these features was high on their list. However, many opportunities exist here due to the high importance level and lower agreement that Manitoba has these features and amenities, for such things as good roads, a wide variety of accommodations, sandy beaches, quality resorts and family activities.

## *Tourism Amenities' Importance Analysis - Greater Toronto -*



**THUNDER BAY** Thunder Bay respondents were in high agreement and ranked the following as highly important when it comes to a tourist destination: safe and clean place, good roads, scenery, family activities, variety of accommodations, mild weather and somewhat less important is lots of lakes. Although they tended to agree that Manitoba has festivals and events, it was not particularly important as a feature that would draw them here as a vacation spot.

## *Tourism Amenities' Importance Analysis - Thunder Bay -*

**SAULT STE MARIE**

Respondents from Sault Ste Marie, along with all other regions, ranked a clean and safe place as something that was very important and that they believe Manitoba offers. Good roads were ranked higher as an important feature of a vacation destination than was scenery, although this feature ranked highest on the agreement scale. They also highly agreed that Manitoba has hunting and fishing and that it is an isolated place, but again, this is not something that is seen to be important when making a vacation decision.

## *Tourism Amenities' Importance Analysis - Sault Ste. Marie -*

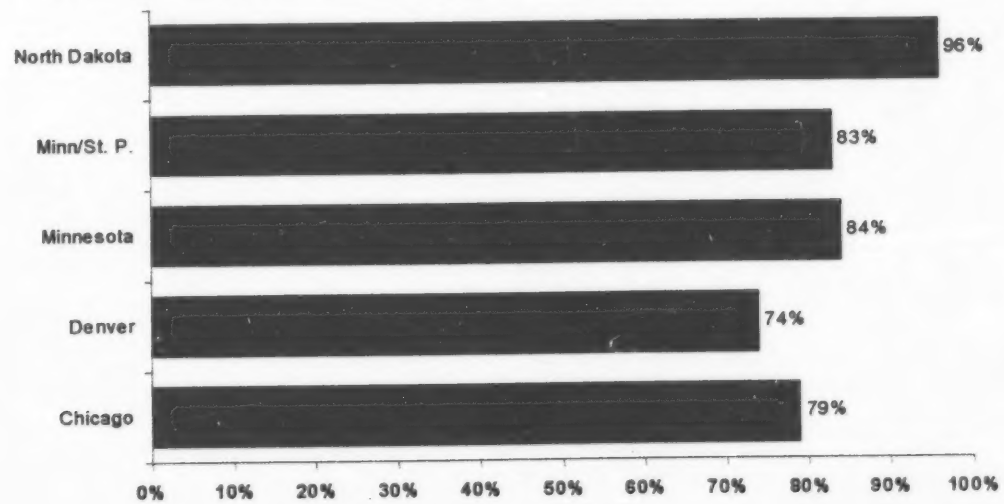
# 10.0 Impact of Currency Differential on Travel Behaviour

## *10.1 Awareness of Dollar Differential*

Most Americans are aware of a difference in the value between the Canadian and U.S. dollars, and many concede that this favourable exchange rate makes Canadian travel destinations more appealing to them. Meanwhile, majorities of Canadians surveyed in key markets suggest this dollar differential has encouraged them to take their vacations north of the 49th parallel.

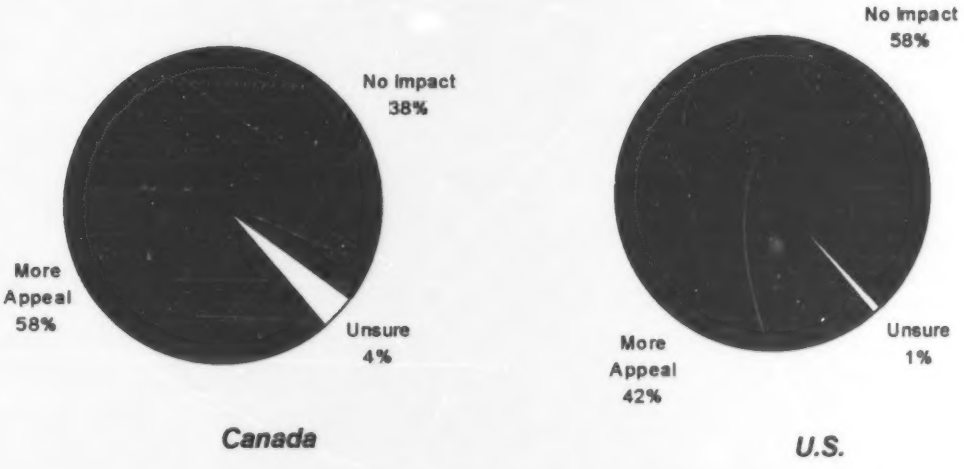
### *Awareness of Currency Difference Among U.S. Travelers*

*Q.32 "As far as you know, is there a difference between the value of the U.S. and Canadian dollar?"*



Over eight in ten (85%) U.S. respondents indicate they know there is a difference between the value of the Canadian and U.S. currencies. This figure rises to 96 percent in North Dakota and falls to 74 percent among respondents from Denver. One in ten (10%) surveyed U.S. respondents indicated they were not sure if there was a difference between currencies, while five percent insisted no such differential existed. Uncertainty was highest in Denver (15%), Minnesota (14%) and Chicago (13%). Also, respondents who had never visited Manitoba were far less certain about differences between the U.S. and Canadian dollars than former visitors to Manitoba (11% versus 3%).

## *Impact of Currency Differential on Travel Behaviour Among Canada and U.S. Travelers*



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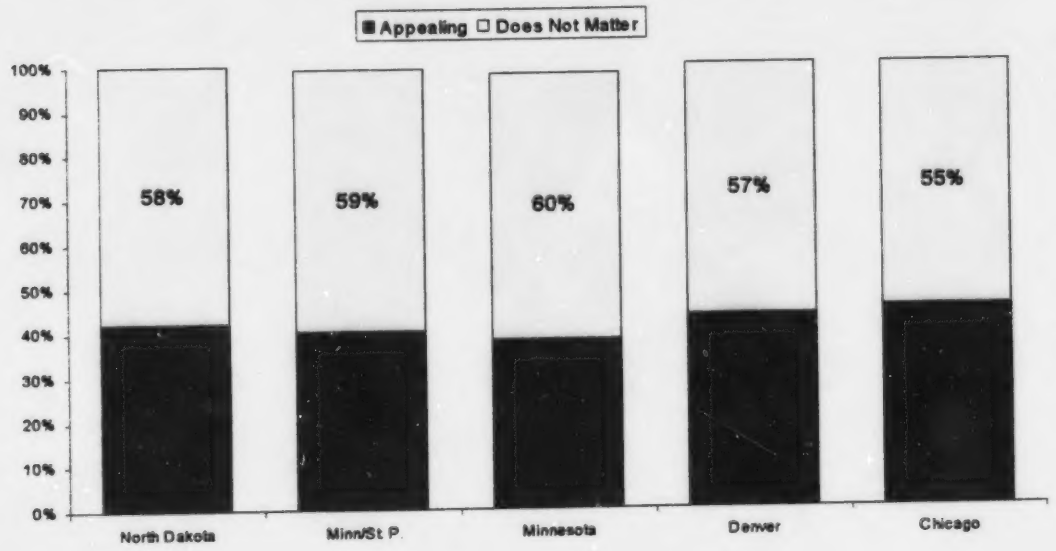
Men were somewhat more likely than women to report they knew there was a difference in the value of the dollar (90% compared to 81% among women) as were higher educated Americans (89% with a technical/vocational degree versus 73% among those with grade school).

## *Impact of Currency Differential on Travel Behaviour - U.S. Travelers -*

*Q.33 "In fact, your dollar is worth approximately 45% more in Canada than in the United States. Does this fact make Canadian travel destinations more appealing to you or does this really not matter to you?"*



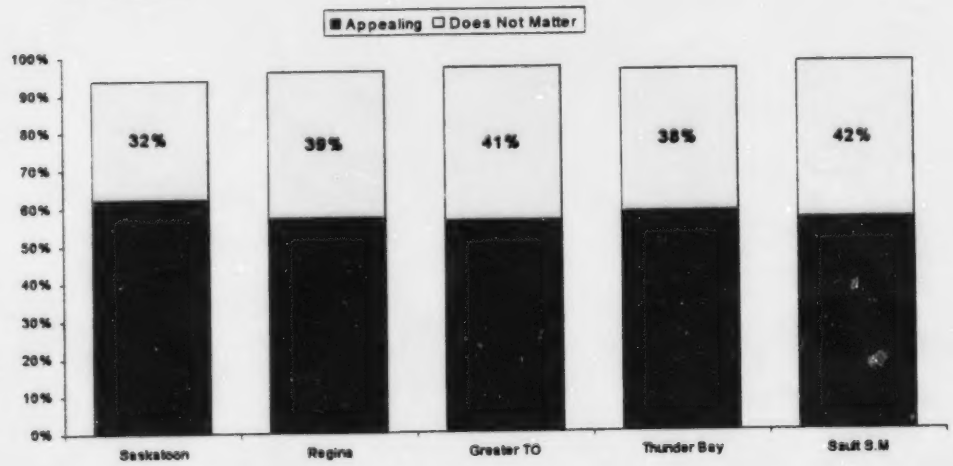
## 10.2 Impact of Dollar Differential

A small majority of U.S. survey participants (58%), reported that the fact that the U.S. dollar is worth approximately 45 percent more in Canada than in their home country did not make travel to a Canadian destination more appealing. Importantly, however, more than two in five surveyed Americans (42%) did indicate that this positive currency position enhanced the appeal of Canadian Travel destinations. "Eclectic" travelers were more likely than either "Urban" or "Outdoor Adventurers" to suggest they were attracted by the difference between these two currencies.

Among Canadians, this difference in currency made Canadian travel destinations even more appealing. Overall, 58 percent of Canadians found staying in Canada to be more attractive due the low U.S. exchange value. Respondents from Saskatoon (62%) reported this appeal most often as did those non-visitors who were keen to travel to Manitoba (72%) and middle income earners (63% among $30-59K annually).

### Impact of Currency Differential on Travel Behaviour - Canadian Travelers -

*Q.34 "As you may know, the Canadian dollar is worth approximately 45% more in Canada than in the United States. Does this fact make Canadian travel destinations more appealing to you or does this really not matter to you?"*



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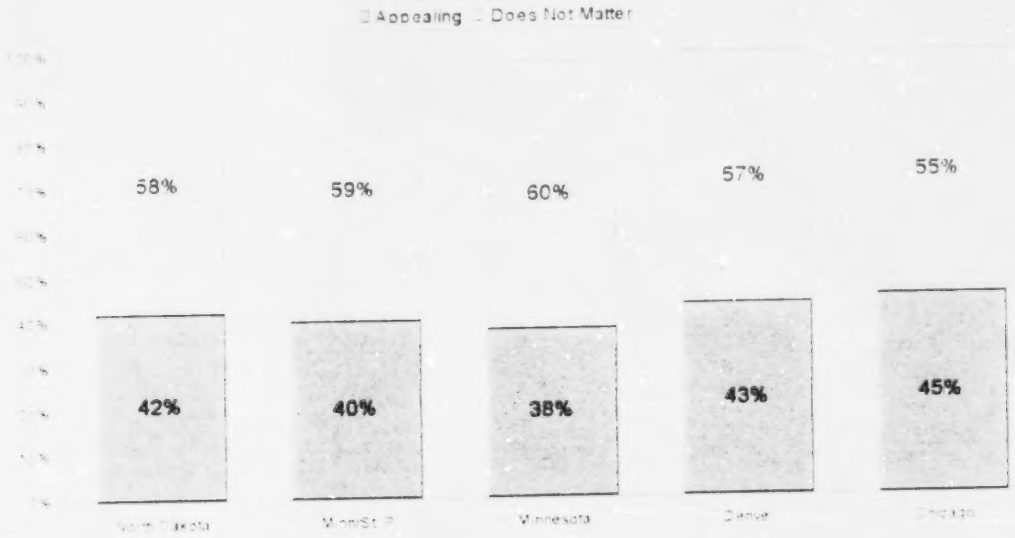

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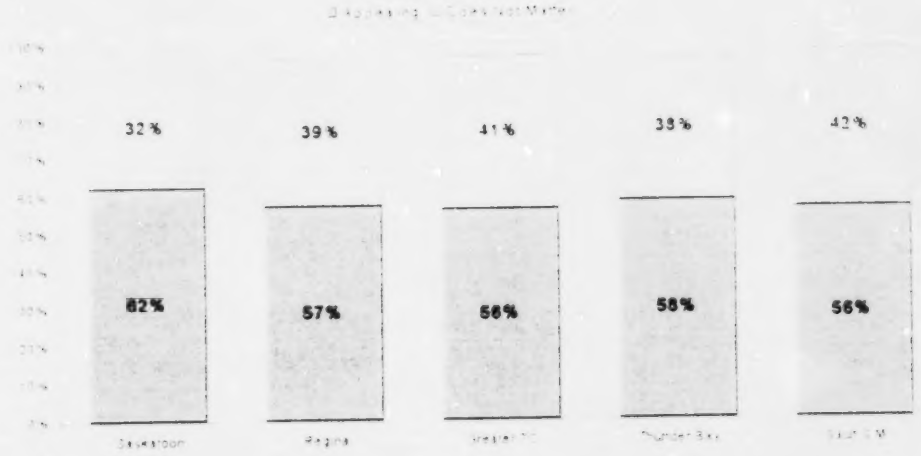
### *Impact of Currency Differential on Travel Behaviour - Canadian Travelers -*



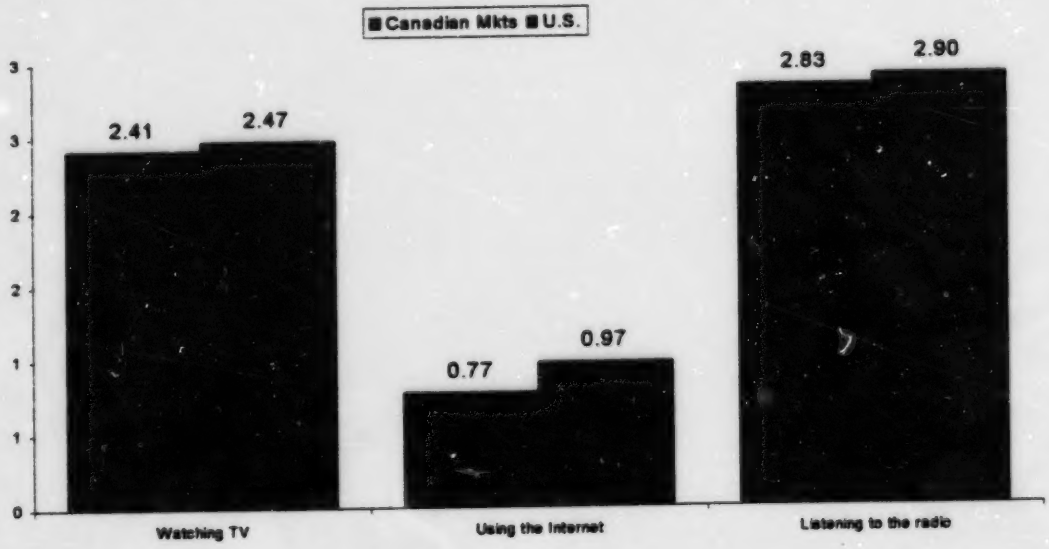
# 11.0 Media Utilization

## *11.1 Media Consumption*

All research participants were presented with a line of enquiry exploring patterns of information consumption and performance. There was a high degree of consistency between Canadians and Americans with respect to the amount of time devoted to selected media consumption activities. However, across the regions studied, Americans are inclined to spend comparatively more time on electronic information consumption.

### *Time Spent Using Selected Media Sources*
### *- Mean Hours -*

*Q.38 "Roughly, how many hours per day do you spend..."*



**Radio** Listening to the radio was the most time consuming media activity on both sides of the border, with Americans spending 2.9 hours on average listening to the radio each day, compared with 2.83 hours for Canadians. Watching TV was the next most popular form of media consumption in both countries (2.47 hours in the U.S. versus 2.41 hours in Canada). Using the Internet consumed considerably less time for residents on either side of the border (.97 hours in the U.S. versus .77 hours in Canada).

Across demographic sub-populations, the amount of time research participants spend listening to the radio decreases as the age of respondents increases. Respondents aged 18-34 years spend 3.26 hours each day listening to the radio, compared with 2.52 hours among those aged 55 years and older.

Other sub-populations that devote comparatively greater amounts of time to this medium include those with the least formal education (3.59 hours for those with less than high school versus 2.52 for university graduates), lower income earners (3.21 hours for those with household incomes of less than $30,000 versus 2.49 for those with incomes in excess of $80,000), and non-visitors who express an interest in someday coming to this province (3.45 hours versus 2.46 hours for those averse to visiting here).

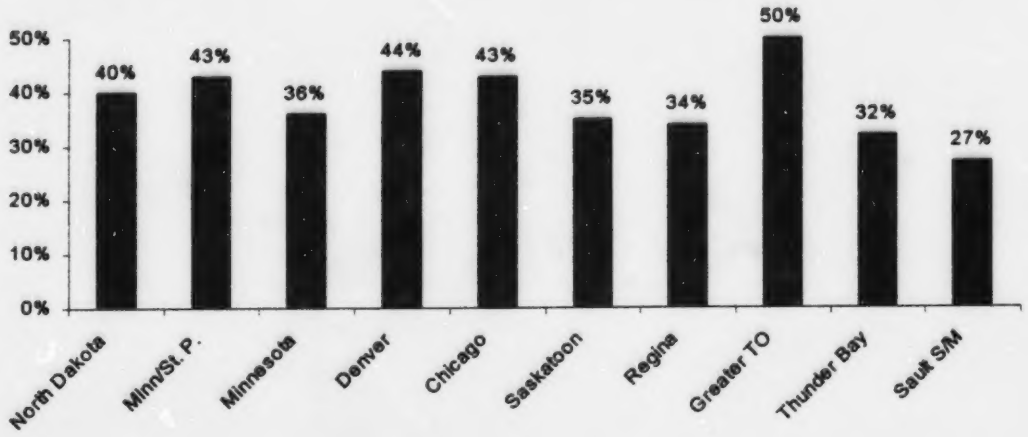
An extensive and complete listing of radio station performances by market appears under question 35 in the detailed tables that are appended to this report.

**Television** Demographically, there are some similarities between those who spend comparatively more time watching television and those who spend more time listening to the radio. Television viewers also tend to lower income (3.26 hours for those with household incomes below $30,000 versus 2.0 hours among those with incomes in excess of $60,000) and have a lower level of education (3.38 hours for less than high school versus 2.19 hours for university educated). However, unlike radio, television is likely to be a more popular form of media consumption among older respondents (3.09 hours among those aged 55 years and older versus 2.19 hours for those aged 18-34 years).

Other demographic groups who are inclined to spend time watching TV include "Urban Adventurers" (2.5 hours versus 2.17 among "Outdoor Adventurers"), those who are not aware of vacation opportunities in Manitoba (2.46 versus 2.21 who report hearing something about travel to this province).

**INTERNET** Overall, 38 percent of survey respondents have access to the Internet. The findings with respect to Internet usage reveal variations across virtually all sub-populations. Regionally, respondents from larger urban centres such as Denver (1.21 hours), Chicago (1.14 hours) and Greater Toronto (1.09 hours) tend to spend more time on the Internet than do their counterparts from Minnesota (.67 hours), Regina (.67 hours), Saskatoon (.62 hours) and Sault Ste. Marie (6 hours).

## Internet Access by Region



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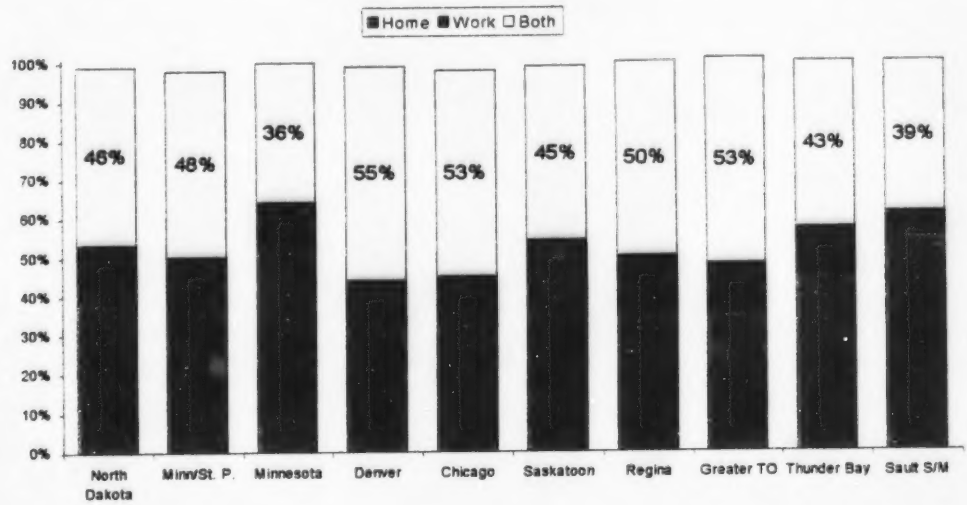
An even more profound demographic Internet gulf exists with respect to age (1.35 hours among those aged 18-34 years versus .38 hours for those aged 55 years and older), education (1.15 hours for the university educated versus .18 for those with less than a high school education), income (1.39 hours for those with household incomes in excess of $80,000 versus .55 for those with incomes below $30,000) and gender (1.06 hours for men versus .71 hours for women). Internet usage is also more pronounced among non-visitors generally (1.07 hours versus .76 hours for former visitors to Manitoba) and more specifically among non-visitors who are averse to coming to Manitoba. Those who were unaware of Manitoba travel and vacation opportunities also spend more time on the Internet (1.01 hours versus .81 hours among those who are Manitoba aware).

Among Internet users, nearly half (47%) use the Internet at both home and work, while a somewhat smaller proportion (39%) access the Internet exclusively at home. Residents of larger urban centres such as Denver (55%), Chicago (53%) and Greater Toronto (53%), were more likely to access the Internet at both home and the workplace.

## *Internet Access Patterns*

*Q.39 "Do you access the Internet at home, at work, or both?"*



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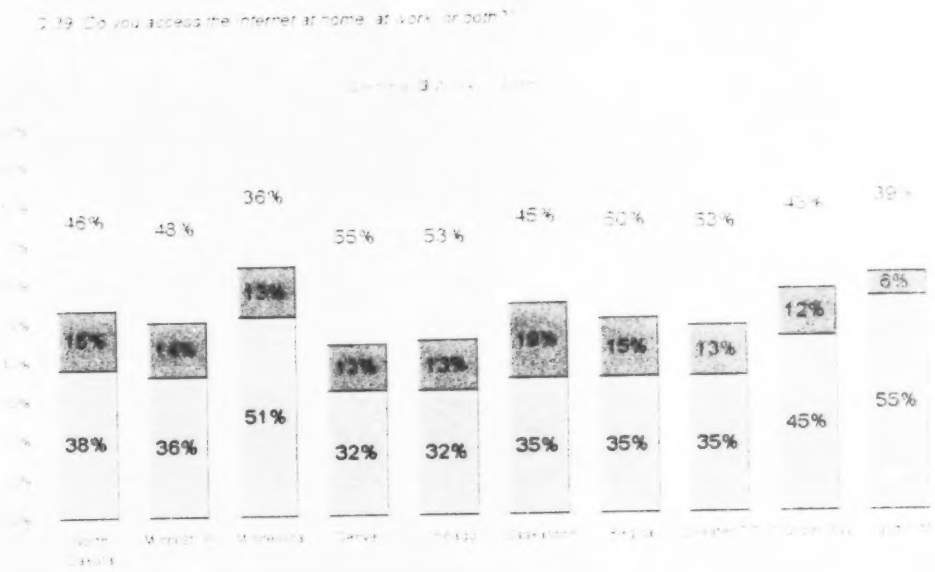
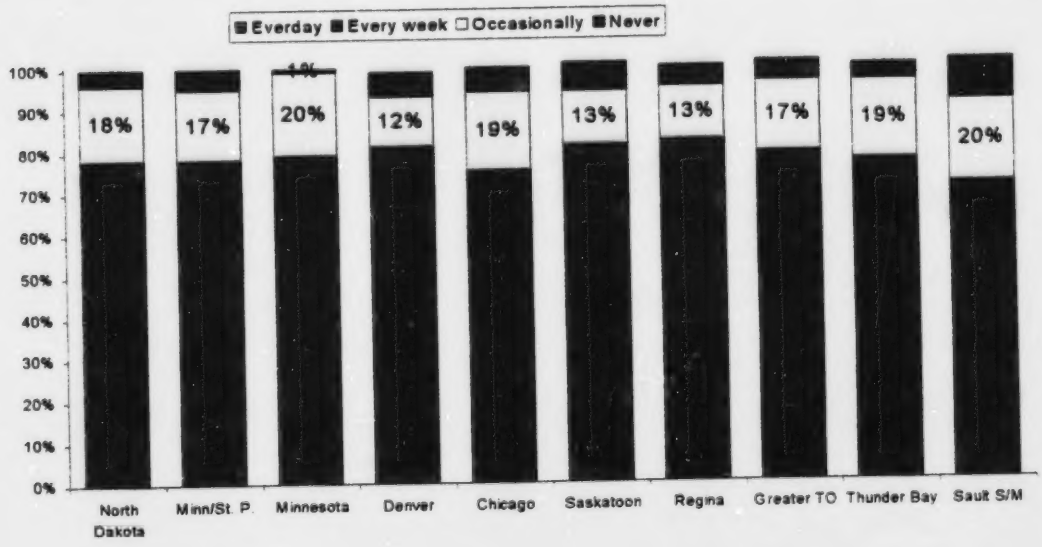


**NEWSPAPERS** There was some variation in newspaper readership across regions with as many as two thirds of those residing in Denver (67%) or Saskatoon (66%) claiming to read the newspaper everyday, as compared with Greater Toronto (49%) where only half of respondents report daily readership.

Greater differences in daily readership levels are evident among younger respondents (40% among those aged 18-34 years versus 79% among those aged 55 years and older). Former visitors to Manitoba (66%) and those who have heard of vacation opportunities (68%) were more likely to be daily newspaper readers, as were those who described themselves to at least some extent as an "Urban Adventurer" (64%).

## Newspaper Readership

*Q.36 "How often do you read a newspaper?"*



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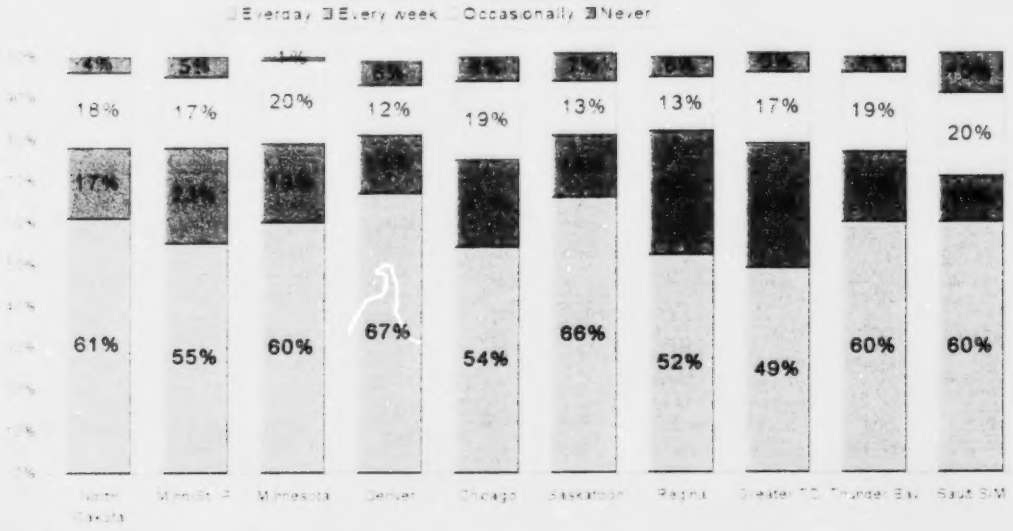
## *Newspaper Readership*

Q.26 "How often do you read a newspaper?"



**MAGAZINES** Magazine preferences encompassed a broad spectrum of reading options. An extensive and complete listing of magazines preferences by market appears under question 37 in the detailed tables that are appended to this report.

### *11.2 Travel Planning Information Resources*

Respondents who had travelled outside of their home province or state in the past three years were presented with an extensive list of potential vacation planning information sources.

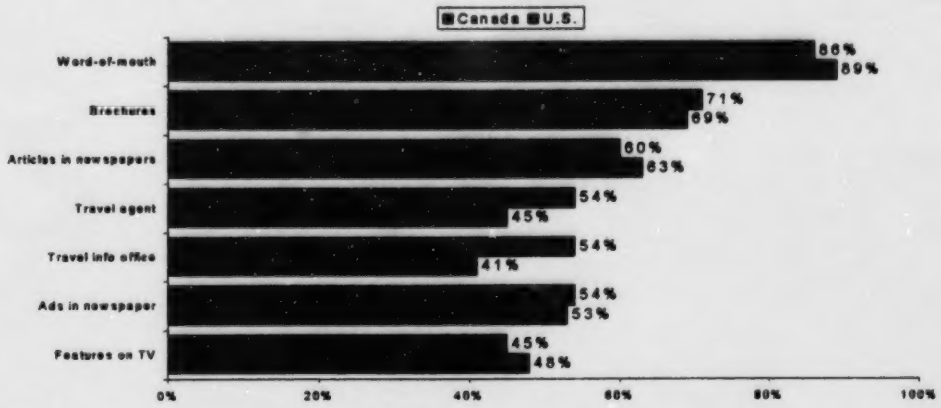
A very strong majority of recent travelers state that they incorporate "word-of-mouth" (88%) information when making vacation plans. Other sources of information used by more than half of travelers include "brochures" (70%), "articles in newspapers and magazines" (62%), and "advertisements in newspapers" (53%).

"Word-of-mouth" recommendation was the most frequently mentioned information source in the regions studied. This one-to-one communication vehicle was especially important for younger respondents (92% among those aged 18-34 years versus 82% among those aged 55 years and older), as well as non-visitors who plan to one day visit Manitoba (93%)

## Use of Selected Vacation Planning Information Resources

**- Percent Indicating "Yes" -**

*Q.40 "When planning a vacation or looking for information on places to visit, which of the following resources do you use? Do you get your travel information..."*




## Use of Selected Vacation Planning Information Resources (cont'd)

**- Percent Indicating "Yes" -**

*Q.40 "When planning a vacation or looking for information on places to visit, which of the following resources do you use? Do you get your travel information..."*